

Solicitation 475-11780

Enterprise Asset Management System

Bid Designation: Public



City of Fort Lauderdale

Bid 475-11780

Enterprise Asset Management System

Bid Number 475-11780
 Bid Title Enterprise Asset Management System

Bid Start Date Apr 12, 2017 11:48:54 AM EDT
 Bid End Date May 18, 2017 2:00:00 PM EDT
 Question & Answer End Date May 11, 2017 5:00:00 PM EDT

Bid Contact Althea Pemsel
 Sr. Procurement Specialist
 Finance
 apemsel@fortlauderdale.gov

Pre-Bid Conference Apr 20, 2017 11:00:00 AM EDT
 Attendance is optional
 Location: City of Fort Lauderdale, City Hall
 Engineering Department, 4th Floor
 Fort Lauderdale, FL 33301
 Site Visit to Follow Pre-proposal Meeting

Description

Purpose

The City of Fort Lauderdale, Florida (City) is seeking qualified, experienced and licensed firm(s) to provide Enterprise Asset Management System for the City's Public Works Department, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).

Point of Contact

For information concerning procedures for responding to this solicitation, contact Senior Procurement Specialist, Althea Pemsel, MA, CPSM, via email at apemsel@fortlauderdale.gov . Such contact shall be for clarification purposes only.

Pre-proposal Conference and Site Visit

There will be a non-mandatory pre-proposal conference for this Request for Proposal on Thursday, April 20, 2017 at 11:00 at the City Fort Lauderdale, 100 N. Andrews Avenue, 4th Floor Conference Room, Fort Lauderdale FL 33308.

While attendance is not mandatory, tours at other times might not be available. It is the sole responsibility of the Contractor to become familiar with the scope of the City's requirements and systems prior to submitting a proposal. No variation in price or conditions shall be permitted based upon a claim of ignorance. It is strongly suggested that all Contractors attend the pre-proposal meeting and/or site visit.

Submission Deadline

Sealed proposals shall be delivered during the City's normal business hours in a sealed envelope and addressed to the City of Fort Lauderdale Procurement Services Division, 100 N. Andrews Avenue, #619, Fort Lauderdale, FL 33301 (City Hall) no later than the date and time specified, at which time and place the proposals will be publicly opened and the names of the firms will be read. After the deadline, proposals will not be accepted. Firms are responsible for making certain that their proposal is received at the location specified by the due date and time. The City of Fort Lauderdale is not responsible for delays caused by any mail, package or courier service, including the U.S. mail, or caused by any other occurrence or condition. The City's normal business hours are Monday through Friday, 8:00 a.m. through 5:00 p.m. excluding holidays observed by the City.

SECTION I – INTRODUCTION AND INFORMATION

1.1 Purpose

The City of Fort Lauderdale, Florida (City) is seeking qualified, experienced and licensed firm(s) to provide Enterprise Asset Management System for the City's Public Works Department, in accordance with the terms, conditions, and specifications contained in this Request for Proposals (RFP).

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1.3 Pre-proposal Conference and Site Visit

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While attendance is not mandatory, tours at other times might not be available. It is the sole responsibility of the Contractor to become familiar with the scope of the City's requirements and systems prior to submitting a proposal. No variation in price or conditions shall be permitted based upon a claim of ignorance. It is strongly suggested that all Contractors attend the pre-proposal meeting and/or site visit.

It will be the sole responsibility of the Contractor to attend the pre-proposal/site visit to inspect the City's location(s) facilities systems prior to submitting a proposal. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the proposer has familiarized themselves with the nature and extent of the work, equipment, materials, and labor required.

1.4 BidSync

The City of Fort Lauderdale uses BidSync (www.bidsync.com) to administer the competitive solicitation process, including but not limited to soliciting proposals, issuing addenda, posting results and issuing notification of an intended decision. There is no charge to register and download the RFP from BidSync. Proposers are strongly encouraged to read the various vendor Guides and Tutorials available in BidSync well in advance of their intention of submitting a proposal to ensure familiarity with the use of BidSync. The City shall not be responsible for a Proposers inability to submit a Proposal by the end date and time for any reason, including issues arising from the use of BidSync.

1.5 Point of Contact

For information concerning procedures for responding to this solicitation, contact Senior Procurement Specialist, Althea Pemsel, MA, CPSM, via email at apemsel@fortlauderdale.gov. Such contact shall be for clarification purposes only.

For information concerning technical specifications, please utilize the question / answer feature provided by BidSync at www.bidsync.com. Questions of a material nature must be received prior to the cut-off date specified in the RFP Schedule. Material changes, if any, to the scope of services or bidding procedures will only be transmitted by written addendum. (See addendum section of BidSync Site). Proposer's Please note: Proposals shall be submitted as stated in PART IV – Submittal Requirements. No part of your proposal can be submitted via FAX. No variation in price or conditions shall be permitted based upon a claim of ignorance. Submission of a proposal will be considered evidence that the Proposer has familiarized themselves with the nature and extent of the work, and the equipment, materials, and labor required. The entire proposal must be submitted in accordance with all specifications contained in this solicitation. The questions and answers submitted in BidSync shall become part of any contract that is created from this RFP.

SECTION II – SPECIAL TERMS AND CONDITIONS

2.1 General Conditions

RFP General Conditions (Form G-107, Rev. 02/15) are included and made a part of this RFP.

2.2 Addenda, Changes, and Interpretations

It is the sole responsibility of each firm to notify the Buyer utilizing the question / answer feature provided by BidSync and request modification or clarification of any ambiguity, conflict, discrepancy, omission or other error discovered in this competitive solicitation. Requests for clarification, modification, interpretation, or changes must be received prior to the Question and Answer (Q & A) Deadline. Requests received after this date may not be addressed. Questions and requests for information that would not materially affect the scope of services to be performed or the solicitation process will be answered within the question / answer feature provided by BidSync and shall be for clarification purposes only. Material changes, if any, to the scope of services or the solicitation process will only be transmitted by official written addendum issued by the City and uploaded to BidSync as a separate addendum to the RFP. Under no circumstances shall an oral explanation given by any City official, officer, staff, or agent be binding upon the City and should be disregarded. All addenda are a part of the competitive solicitation documents and each firm will be bound by such addenda. It is the responsibility of each to read and comprehend all addenda issued.

2.3 Changes and Alterations

Proposer may change or withdraw a Proposal at any time prior to Proposal submission deadline; however, no oral modifications will be allowed. Modifications shall not be allowed following the Proposal deadline.

2.4 Proposer's Costs

The City shall not be liable for any costs incurred by proposers in responding to this RFP.

2.5 Pricing/Delivery

All pricing should be identified on the Cost Proposal page provided in this RFP. Additional costs may be accepted, other than the costs stated on the Cost Proposal page as it pertains to additional modules, works, or implementation. Failure to use the City's Cost Proposal page and provide costs as requested in this RFP may deem your proposal non-responsive.

Prices proposed shall be valid for at least One-Hundred and Twenty (120) days from time of RFP opening unless otherwise extended and agreed upon by the City and proposer.

2.6 Invoices/Payment

The City will accept invoices no more frequently than once per month. Each invoice shall fully detail the related costs and shall specify the status of the particular task or project as of the date

of the invoice with regard to the accepted schedule for that task or project. Payment will be made within forty-five (45) days after receipt of an invoice acceptable to the City, in accordance with the Florida Local Government Prompt Payment Act. If, at any time during the contract, the City shall not approve or accept the Proposer's work product, and agreement cannot be reached between the City and the Proposer to resolve the problem to the City's satisfaction, the City shall negotiate with the Proposer on a payment for the work completed and usable to the City. This negotiated payment shall be based on the overall task or project breakdown, relative to the projected number of hours for each task element, and the percentage of work completed. A payment schedule based upon agreed upon deliverables may be developed with the awarded Proposer.

2.7 Related Expenses/Travel Expenses

Any travel out of the Tri County (Dade, Broward and Palm Beach Counties) area shall be in accordance with current City per diem rates and travel policy. Current policy may be viewed at the City website: http://www.fortlauderdale.gov/purchasing/travel/9_4_1.pdf. No costs for travel, meals, or accommodations shall be charged to the City for travel within the tri county area unless the Proposer's office assigned to the project is located outside this area. Proposer shall include as a part of the solicitation response, all details and costs regarding anticipated travel expenses and note such costs on the price sheet as a separate line item.

Proposer shall incur no travel or related expenses chargeable to the City without prior approval by an authorized City representative (City's Director of Finance or City Manager). Proposer shall provide, if required by the City, documentation of all actual travel or related costs.

2.8 Payment Method

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to payment by credit card via MasterCard or Visa. This allows you as a vendor of the City of Fort Lauderdale to receive your payment fast and safely. No more waiting for checks to be printed and mailed. Payments will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, firms must presently have the ability to accept credit card payment or take whatever steps necessary to implement acceptance of a credit card before the commencement of a contract. See Contract Payment Method form attached.

2.9 Mistakes

The Proposer shall examine this RFP carefully. The submission of a Proposal shall be prima facie evidence that the Proposer has full knowledge of the scope, nature, and quality of the work to be performed; the detailed requirements of the specifications; and the conditions under which the work is to be performed. Ignorance of the requirements will not relieve the Proposer from liability and obligations under the Contract.

2.10 Acceptance of Proposals / Minor Irregularities

2.10.1 The City reserves the right to accept or reject any or all proposals, part of proposals, and to waive minor irregularities or variances to specifications contained in proposals which do not make the proposal conditional in nature and minor irregularities in the solicitation process. A minor irregularity shall be a variation from the solicitation that does not affect the price of the contract or does not give a respondent an advantage or benefit not enjoyed by other respondents, does not adversely impact the interests of other firms or, does not affect the fundamental fairness of the solicitation process. The City also reserves the right to reissue a Request for Proposal.

2.10.2 The City reserves the right to disqualify Proposer during any phase of the competitive solicitation process and terminate for cause any resulting contract upon evidence of collusion with intent to defraud or other illegal practices on the part of the Proposer.

2.11 Modification of Services

2.11.1 While this contract is for services provided to the department referenced in this Request for Proposals, the City may require similar work for other City departments. Successful Proposer agrees to take on such work unless such work would not be considered reasonable or become an undue burden to the Successful Proposer.

2.11.2 The City reserves the right to delete any portion of the work at any time without cause, and if such right is exercised by the City, the total fee shall be reduced in the same ratio as the estimated cost of the work deleted bears to the estimated cost of the work originally planned. If work has already been accomplished and approved by the City on any portion of a contract resulting from this RFP, the Successful Proposer shall be paid for the work completed on the basis of the estimated percentage of completion of such portion to the total project cost.

2.11.3 The City may require additional items or services of a similar nature, but not specifically listed in the contract. The Successful Proposer agrees to provide such items or services, and shall provide the City prices on such additional items or services based upon a formula or method, which is the same or similar to that used in establishing the prices in his proposal. If the price(s) offered are not acceptable to the City, and the situation cannot be resolved to the satisfaction of the City, the City reserves the right to procure those items or services from other vendors, or to cancel the contract upon giving the Successful Proposer thirty (30) days written notice.

2.11.4 If the Successful Proposer and the City agree on modifications or revisions to the task elements, after the City has approved work to begin on a particular task or project, and a budget has been established for that task or project, the Successful Proposer will submit a revised budget to the City for approval prior to proceeding with the work.

2.12 No Exclusive Contract

Proposer agrees and understands that the contract shall not be construed as an exclusive arrangement and further agrees that the City may, at any time, secure similar or identical services from another Proposer at the City's sole option.

2.13 Sample Contract Agreement

A sample of the formal agreement template, which may be required to be executed by the awarded Proposer, can be found at our website http://fortlauderdale.gov/purchasing/AWARDS/CONTRACT_TEMPLATE_SERVICES.pdf

2.14 Responsiveness

In order to be considered responsive to the solicitation, the firm's proposal shall fully conform in all material respects to the solicitation and all of its requirements, including all form and substance.

2.15 Responsibility

In order to be considered as a responsible firm, firm shall be fully capable to meet all of the requirements of the solicitation and subsequent contract, must possess the full capability, including financial and technical, to perform as contractually required, and must be able to fully document the ability to provide good faith performance.

2.16 Minimum Qualifications

Proposers shall be in the business of software implementation and project management and must possess sufficient financial support, equipment and organization to ensure that it can satisfactorily perform the services if awarded a Contract. Proposers must demonstrate that they, or the principals assigned to the project, have successfully provided services with similar magnitude to those specified in the scope of services to at least one public entity similar in size and complexity to the City of Fort Lauderdale or can demonstrate that they possess the organizational, functional and technical capabilities to provide an Enterprise Asset Management (EAM) solution that meets the City's needs and is tightly integrated with ESRI ArcGIS. Experience with large scale private sector clients and the managerial and financial ability to successfully perform the work will also be considered. Proposers shall satisfy each of the following requirements cited below. Failure to do so may result in the proposal being deemed non-responsive.

2.16.1 Proposer or principals shall have at least seven (7) years of direct software systems implementation and project management experience. Project manager assigned to the project must have a minimum of five (5) years' experience in software implementation and project management and have served as project manager on three (3) similar projects in size and scope as well as the proposer or principals. The information should include whether proposer and project manager were the prime Proposer or the sub-Proposer, what percentage of the project was completed, and whether the project finished on time and within budget.

2.16.2 Before awarding a contract, the City reserves the right to require that a Proposer submit such evidence of qualifications as the City may deem necessary. Further, the City may consider any evidence of the financial, technical, and other qualifications and abilities of a firm or principals, including previous experiences of same with the City and performance evaluation for services, in making the award in the best interest of the City.

2.16.3 Firm or principals shall have no record of judgments, pending lawsuits against the City or criminal activities involving moral turpitude and not have any conflicts of interest that have not been waived by the City Commission.

2.16.4 Neither firm nor any principal, officer, or stockholder shall be in arrears or in default of any debt or contract involving the City, (as a party to a contract, or otherwise); nor have failed to perform faithfully on any previous contract with the City.

2.16.5 Firm and those performing the work must be appropriately licensed and registered in the State of Florida.

2.17 Lobbying Activities

Any Proposer submitting a response to this solicitation must comply, if applicable, with City of Fort Lauderdale Ordinance No. C-00-27 & Resolution No. 07-101, Lobbying Activities. Copies of Ordinance No. C-00-27 and Resolution No. 07-101 may be obtained from the City Clerk's Office on the 7th Floor of City Hall, 100 N. Andrews Avenue, Fort Lauderdale, Florida. The ordinance may also be viewed on the City's website at: http://www.fortlauderdale.gov/clerk/LobbyistDocs/lobbyist_ordinance.pdf.

2.18 Protest Procedure

2.18.1 Any Proposer or Bidder who is not recommended for award of a contract and who alleges a failure by the city to follow the city's procurement ordinance or any applicable law may protest to the director of procurement services division (director), by delivering a letter of

protest to the director within five (5) days after a notice of intent to award is posted on the city's web site at the following link:
http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm

2.18.2 The complete protest ordinance may be found on the city's web site at the following link:
<http://www.fortlauderdale.gov/purchasing/protestordinance.pdf>

2.19 Public Entity Crimes

Proposer, by submitting a proposal attests she/he/it has not been placed on the convicted vendor list. A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a Proposer, supplier, Sub consultant, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, Florida Statutes, for Category Two for a period of 36 months from the date of being placed on the convicted vendor list.

2.20 Subconsultants

2.20.1 If the Proposer proposes to use Subconsultants in the course of providing these services to the City, this information shall be a part of the bid response. Such information shall be subject to review, acceptance and approval of the City, prior to any contract award. The City reserves the right to approve or disapprove of any subconsultant candidate in its best interest and to require Proposer to replace subconsultant with one that meets City approval.

2.20.2 Proposer shall ensure that all of Proposer's Subconsultants perform in accordance with the terms and conditions of this Contract. Proposer shall be fully responsible for all of Proposer's Subconsultants' performance, and liable for any of Proposer's Subconsultants' non-performance and all of Proposer's Subconsultants' acts and omissions. Proposer shall defend, at Proposer's expense, counsel being subject to the City's approval or disapproval, and indemnify and hold harmless the City and the City's officers, employees, and agents from and against any claim, lawsuit, third-party action, or judgment, including any award of attorney fees and any award of costs, by or in favor of any Proposer's Subconsultants for payment for work performed for the City.

2.20.3 Proposer shall require all of its Subconsultants to provide the required insurance coverage as well as any other coverage that the Proposer may consider necessary, and any deficiency in the coverage or policy limits of said Subconsultants will be the sole responsibility of the Proposer.

2.21 Payment and Performance Bond

2.21.1 The Proposer shall within fifteen (15) working days after notification of award, furnish to the City a Payment and Performance Bond, in the amount of the proposed price as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Payment and Performance Bond. The Performance Bond must be executed by a surety company or recognized standing to do business in the State of Florida and having a resident agent.

2.21.2 The Proposer must have a Financial Size Categories (FSC) rating of no less than "A-" by the latest edition of Best's Key Rating Guide, or acceptance of insurance company that

holds a valid Florida Certificate of Authority issued by the State of Florida, Department of Insurance, and are members of the Florida Guarantee Fund.

2.21.3 Acknowledgement and agreement is given by both parties that the amount herein set for the Payment and Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Proposer to the City in the event of a material breach of this Agreement by the Proposer.

2.21.4 Failure of the successful proposer to execute a contract, provide a performance Bond, and furnish evidence of appropriate insurance coverage, as provided herein, within thirty (30) days after written notice of award has been given, shall be just cause for the annulment of the award and the forfeiture of the proposal security to the City, which forfeiture shall be considered, not as a penalty, but as liquidation of damages sustained.

2.22 Insurance Requirements

2.22.1 The Proposer shall furnish proof of insurance requirements as indicated below. The coverage is to remain in force at all times during the contract period. The following minimum insurance coverage is required. The City is to be added as an "additional insured" with relation to General Liability Insurance. This MUST be written in the description section of the insurance certificate, even if you have a check-off box on your insurance certificate. Any costs for adding the City as "additional insured" will be at the Proposer's expense.

2.22.2 The City of Fort Lauderdale shall be given notice 10 days prior to cancellation or modification of any stipulated insurance. The insurance provided shall be endorsed or amended to comply with this notice requirement. In the event that the insurer is unable to accommodate, it shall be the responsibility of the Proposer to provide the proper notice. Such notification will be in writing by registered mail, return receipt requested and addressed to the Procurement Services Division.

2.22.3 The Proposer's insurance must be provided by an A.M. Best's "A-" rated or better insurance company authorized to issue insurance policies in the State of Florida, subject to approval by the City's Risk Manager. Any exclusions or provisions in the insurance maintained by the Proposer that precludes coverage for work contemplated in this RFP shall be deemed unacceptable, and shall be considered breach of contract.

Workers' Compensation and Employers' Liability Insurance

Limits: Workers' Compensation – Per Florida Statute 440

Employers' Liability - \$500,000

Any firm performing work on behalf of the City of Fort Lauderdale must provide Workers' Compensation insurance. Exceptions and exemptions will be allowed by the City's Risk Manager, if they are in accordance with Florida Statute. For additional information contact the Department of Financial Services, Workers' Compensation Division at (850) 413-1601 or on the web at www.fldfs.com.

Commercial General Liability Insurance

Covering premises-operations, products-completed operations, independent Consultants and contractual liability.

Limits: Combined single limit bodily injury/property damage \$1,000,000. This coverage must include, but not limited to:

- a. Coverage for the liability assumed by the Proposer under the indemnity provision of the contract.
- b. Coverage for Premises/Operations
- c. Products/Completed Operations
- d. Broad Form Contractual Liability
- e. Independent Consultants

Automobile Liability Insurance

Covering all owned, hired and non-owned automobile equipment.

| | |
|-----------------------|--|
| Limits: Bodily injury | \$250,000 each person, \$500,000 each occurrence |
| Property damage | \$100,000 each occurrence |

Professional Liability (Errors & Omissions)

Consultants

Limits: \$2,000,000 per occurrence

2.22.4 A copy of **ANY** current Certificate of Insurance should be included with your proposal.

2.22.5 In the event that you are the successful Proposer, you will be required to provide a certificate naming the City as an “additional insured” for General Liability. Certificate holder should be addressed as follows:

City of Fort Lauderdale
Procurement Services Division
100 N. Andrews Avenue, Room 619
Fort Lauderdale, FL 33301

2.23 Award of Contract

A Contract (the “Agreement”) may be awarded by the City Commission. The City reserves the right to execute or not execute, as applicable, a contract with the Proposer(s) that is determined to be in the City’s best interests. The City reserves the right to award a contract to more than one Proposer, at the sole and absolute discretion of the in the City.

2.24 Unauthorized Work

The Successful Proposer(s) shall not begin work until a Contract has been awarded by the City Commission and a purchase order or notice to proceed has been issued. Proposer(s) agree and understand that the issuance of a Purchase Order and/or Task Order shall be issued and provided to the Successful Proposer(s) following Commission award; however, receipt of a purchase order and/or task order shall not prevent the Successful Proposer(s) from commencing the work once the City Commission has awarded the contract and notice to proceed is issued.

2.25 Uncontrollable Circumstances (“Force Majeure”)

The City and Proposer will be excused from the performance of their respective obligations under this agreement when and to the extent that their performance is delayed or prevented by any circumstances beyond their control including, fire, flood, explosion, strikes or other labor disputes, act of God or public emergency, war, riot, civil commotion, malicious damage, act or omission of any governmental authority, delay or failure or shortage of any type of transportation, equipment, or service from a public utility needed for their performance, provided that:

- 2.25.1** The non performing party gives the other party prompt written notice describing the particulars of the Force Majeure including, but not limited to, the nature of the occurrence and its expected duration, and continues to furnish timely reports with respect thereto during the period of the Force Majeure;
- 2.25.2** The excuse of performance is of no greater scope and of no longer duration than is required by the Force Majeure;
- 2.25.3** No obligations of either party that arose before the Force Majeure causing the excuse of performance are excused as a result of the Force Majeure; and
- 2.25.4** The non performing party uses its best efforts to remedy its inability to perform. Notwithstanding the above, performance shall not be excused under this Section for a period in excess of two (2) months, provided that in extenuating circumstances, the City may excuse performance for a longer term. Economic hardship of the Proposer will not constitute Force Majeure. The term of the agreement shall be extended by a period equal to that during which either party's performance is suspended under this Section.

2.26 Canadian Companies

The City may enforce in the United States of America or in Canada or in both countries a judgment entered against the Proposer. The Proposer waives any and all defenses to the City's enforcement in Canada, of a judgment entered by a court in the United States of America. All monetary amounts set forth in this Contract are in United States dollars.

2.27 News Releases/Publicity

News releases, publicity releases, or advertisements relating to this contract or the tasks or projects associated with the project shall not be made without prior City approval.

2.28 Contract Period

The initial contract term shall commence upon date of award by the City and shall expire three (3) years from that date. The City reserves the right to extend the contract for two (2), additional one (1) year terms, providing all terms conditions and specifications remain the same, both parties agree to the extension, and such extension is approved by the City. The City may elect to award the contract in any contract term combination which best suits the City. The project will be a phased in approach to acquire and add additional modules or asset data collection, data transfer and other efforts to create a fully integrated functioning system on an as needed basis according to section 2.11.4. The other contract extension option years can be used for additional phases and the City reserves the right to extend beyond the five years for additional modules being added and to obtain the return on investment.

In the event services are scheduled to end because of the expiration of this contract, the Proposer shall continue the service upon the request of the City as authorized by the awarding authority. The extension period shall not extend for more than one hundred and twenty (120) days beyond the expiration date of the existing contract. The Proposer shall be compensated for the service at the rate in effect when this extension clause is invoked by the City.

2.29 Cost Adjustments

Prices quoted shall be firm for the initial contract term of three (3) year(s). No cost increases shall be accepted in this initial contract term. Consider this when providing pricing for this request for proposal.

Thereafter, any extensions which may be approved by the City shall be subject to the following: costs for any extension terms shall be subject to an adjustment only if increases or decreases

occur in the industry. Such adjustment shall be based on the latest yearly percentage increase in the All Urban Consumers Price Index (CPI-U) as published by the Bureau of Labor Statistics, U.S. Department of Labor, and shall not exceed five percent (3%).

The yearly increase or decrease in the CPI shall be that latest Index published and available for the calendar year ending 12/31, prior to the end of the contract year then in effect, as compared to the index for the comparable month, one-year prior.

Any requested adjustment shall be fully documented and submitted to the City at least ninety (90) days prior to the contract anniversary date. Any approved cost adjustments shall become effective on the beginning date of the approved contract extension.

The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, or considered to be excessive, or if decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the Contract will be considered cancelled on the scheduled expiration date.

2.30 Service Test Period

If the Proposer has not previously performed the services to the city, the City reserves the right to require a test period to determine if the Proposer can perform in accordance with the requirements of the contract, and to the City's satisfaction. Such test period can be from thirty to ninety days, and will be conducted under all specifications, terms and conditions contained in the contract. This trial period will then become part of the initial contract period.

A performance evaluation will be conducted prior to the end of the test period and that evaluation will be the basis for the City's decision to continue with the Proposer or to select another Proposer (if applicable).

2.31 Contract Coordinator

The City may designate a Contract Coordinator whose principal duties shall be:

- Liaison with Proposer.
- Coordinate and approve all work under the contract.
- Resolve any disputes.
- Assure consistency and quality of Proposer's performance.
- Schedule and conduct Proposer performance evaluations and document findings.
- Review and approve for payment all invoices for work performed or items delivered.

2.32 Proposer Performance Reviews and Ratings

The City Contract Coordinator may develop a Proposer performance evaluation report. This report shall be used to periodically review and rate the Proposer's performance under the contract with performance rating as follows:

| | |
|----------------|--|
| Excellent | Far exceeds requirements. |
| Good | Exceeds requirements |
| Fair | Just meets requirements. |
| Poor | Does not meet all requirements and Proposer is subject to penalty provisions under the contract. |
| Non-compliance | Either continued poor performance after notice or a performance level that does not meet a significant portion of the requirements. This rating makes the Proposer subject to the default or cancellation for cause provisions of the contract. |

The report shall also list all discrepancies found during the review period. The Proposer shall be provided with a copy of the report, and may respond in writing if he takes exception to the report or wishes to comment on the report. Proposer performance reviews and subsequent reports will be used in determining the suitability of contract extension.

2.33 Substitution of Personnel

It is the intention of the City that the Proposer's personnel proposed for the contract will be available for the contract term. In the event the Proposer wishes to substitute trained, qualified, personnel for those listed in the proposal, the City shall receive prior notification and have the right to review, and approve such substitutions, if deemed necessary. If the City has reasonable evidence to believe that an employee of the Proposer is incompetent, or has performed his or her employment in an objectionable manner, the City shall have the right to require the Proposer to resolve the situation to the City's satisfactions, provided, however, that the Proposer shall not be required to institute or pursue to completion any action if to do so would violate any law, state statute, city ordinance, contract or employment or union agreement. No more than 20% of the original team can be substituted and the City understands that other staff members with applicable system expertise may be utilized as long as they do not replace the core team members, otherwise the change will be applied to the 20%.

In the event substitute personnel are not satisfactory to the City and the matter cannot be resolved to the satisfaction of the City, the City reserves the right to cancel the Contract for cause. See Section 5.09 General Conditions.

2.34 Ownership of Work

The City shall have full ownership and the right to copyright, otherwise limit, reproduce, modify, sell, or use all of the work or product produced under this contract without payment of any royalties or fees to the Proposer above the agreed hourly rates and related costs.

2.35 Warranties of Usage

Any estimated quantities listed are for information and tabulation purposes only. No warranty or guarantee of quantities needed is given or implied. It is understood that the Proposer will furnish the City's needs as they arise.

END OF SECTION

SECTION III - TECHNICAL SPECIFICATIONS/SCOPE OF SERVICES

3.0 Background Information

- 3.0.1** The purpose of this RFP is to solicit proposals from software suppliers, systems integrators, implementation partners and/or Value Added Resellers (VARs) who can demonstrate that they possess the organizational, functional and technical capabilities to provide an Enterprise Asset Management (EAM) solution that meets the City's needs and is tightly integrated with ESRI ArcGIS.
- 3.0.2** The City is seeking an integrated "off the shelf" packaged solution that will meet its core requirements out of the box with minimal modifications. The City expects the supplier to perform the related professional services (e.g. best practices guidance, training, project management, implementation, integration, inventory, asset data collection and entry, and report development) in a timely and professional manner with EAM experts experienced with successfully implementing the proposed solution at comparable municipalities with similar requirements for water, waste water, storm water, streets/transportation, facility maintenance, parks and recreation, and GIS. The system must be scalable and have the ability to expand the technology and the functions.
- 3.0.3** The City will consider proposals from single suppliers or from multiple suppliers working as a team. In the event multiple suppliers submit a proposal together, the City expects that there will be one prime contact who will be responsible for the whole project and for coordinating the work of the other suppliers.
- 3.0.4** The successful supplier shall be responsible for the final City approved design, installation, implementation and commissioning of the EAM system including development of user acceptance testing, system integration and connectivity to existing resources.

3.1 **EAM System to Provide the Following:**

- 3.1.1** A highly intuitive system from a user perspective, which can allow the City of Fort Lauderdale to take advantage of technology to improve departmental performance and efficiency.
- 3.1.2** Easy access to the data for report and query generation without the need for a programming specialist.
- 3.1.3** Support for user-friendly mobile technology for field crews using IPads and other mobile devices.
- 3.1.4** The ability to plan, monitor and forecast annual work quantities and required resources (labor, equipment, material, budget) for a variety of infrastructure systems at a program level including but not limited to: Right of Way Roadways, surfaces, sidewalk, ditches, storm conveyance systems, and assets such as water conveyance infrastructure (pumps, valves, main lines), trees, sewer (pumps, lift stations, lines).
- 3.1.5** Asset tracking for specific assets (individually and by program) including the ability to track levels of service and life cycle data, condition assessments, pictures, warranty and licensing documentation, and completed project information. The new EAM system should seamlessly provide reports for a "level of service" based on a pre-established target hours and actual hours, which are used to benchmark service to

industry standards. The level of service will be incorporated into our best management practices: allocating and scheduling of staff, comparing of proposed and actual time spent, dollars spent, production units, and unit costs at the task and program levels, as well as by work order/project and by specific asset. Planned versus actual reports will be produced by month and cumulatively for specific work units. The system will enable an asset-based Records Management system.

3.1.6 Work Order management (individually and by program)

3.1.7 The ability to evaluate and modify work methods and performance to maximize efficiency of existing maintenance resources to ensure that program goals are met.

The City of Fort Lauderdale currently has about 2000 work orders a month associated with an asset. The City receives about 24,000 service requests a year, some of which become work orders.

The City is currently using Cayenta Utilities and Cayenta Work Order Management. Cayenta Utilities is licensed by the number of customer accounts (60,000). Cayenta Work Management is licensed and is an additional module to Cayenta Utilities. In addition, the City uses the QScend's QAlert citizen request management system which is a central web based system which the user enters service requests that are routed to the appropriate department for resolution. The City also uses QAlert mobile which allows instant resolution entry and uploading of pictures from field personnel using the Apple iPad.

It is expected that if the City implements a new EAM system, a lot of work will be needed to define processes, design the system and data elements to be captured, configure the system holistically to optimize the City's use of the system and integrate the system with key 3rd party systems such as ESRI. The City is very GIS-centric, using ESRI ArcGIS for the whole enterprise.

3.2 Current Technical Environment

The City has established technology standards and prefers to adhere to them as part of the implementation of the EAM system. Proposer's response to this RFP should reference the information below and clearly identify the following:

3.2.1 An area of known or potential conflict between the proposer's proposed solution and the City's defined environments.

3.2.2 Recommendations of how best to implement and operate the proposed solution within the City's defined environments

3.3 Network Infrastructure Configuration

3.3.1 The City's network consists of approximately 80 buildings/sites. The City primarily uses Fiber Optic cable at 1GB.

3.3.2 A maintenance program is in place to support all key components of the network. Core Systems have a 4 hour response.

3.4 Local Area Network

The City's network uses Cisco Systems and has the capability of extended VLAN across data centers. The core network includes Nexus 7706 routers.

3.5 Server & Operating System

3.5.1 Active Directory 2008 is used for Directory Services.

3.5.2 The Standard Server Operating System in place at the City is Windows 2012.

3.5.3 The City has virtualized the environment using VMware VSphere 5.5.

3.6 Web Server Software and Email System

3.6.1 IIS 7.5 and laterNet 4.0 or higher

3.6.2 Microsoft Exchange Server 2010

3.7 Database

3.7.1 Microsoft SQL Server 2014 and higher, as well as Oracle 12c or higher running on Windows or Linux.

3.8 GIS

3.8.1 Esri ArcGIS

3.8.2 Esri ArcSDE running on Microsoft SQL

3.8.3 Esri Enterprise Geodatabase,

3.8.4 Esri file geodatabase, and

3.8.5 Esri Shapefile

3.9 Storage & Backup Environment

3.9.1 Backups are performed disk-to-disk and disk to tape. Full backups are performed on systems on a weekly and monthly basis.

3.9.2 VERITAS NetBackup is used for backups and the City currently backs up to disk.

3.10 Workstation

3.10.1 The majority of the systems are manufactured by Dell.

3.10.2 The current standard workstation configuration in use is:

- a. Intel Core i3/i5/i7
- b. 4 GB RAM Minimum
- c. 250GB SSD Hard Drive or 550GB Hybrid or 1TB
- d. Windows 7 Professional Operating System (primarily 32-bit)
- e. DVD-RW Drive
- f. 10/100/1000 Base-T/TX PCI Network Interface Card
- g. Three (3) year on-site service maintenance agreement on Desktops, 4 years for laptops

3.10.3 Desktops and laptops are refreshed every 4-5 years.

3.10.4 The standard workstation operating system is Windows 7.

3.10.5 The City uses PDQ Deploy for workstation management.

3.10.6 The City currently uses Windows SUS system for workstation patch management.

3.10.7 On the workstations, Sophos 5.3 is used for antivirus protection.

3.10.8 Web Browser:

- a. Microsoft Internet Explorer v9, 10, and 11
- b. Chrome

3.11 Mobile Devices

3.11.1 iPad

3.11.2 Android

3.12 Business Applications

3.12.1 MS Office Suite

3.12.2 Laserfiche

3.12.3 Cayenta Utility Billing & Work Management

3.12.4 QSend QAlert Citizen Request Management and QAlert Mobile systems

3.12.5 Cognos 7.4, 8.3 and 8.4

3.12.6 Crystal Reports 11 and 2011

3.12.7 Business Objects XI 3.1

3.12.8 ERP System (Infor/Lawson Financials) (Procurement and Finance) – to be implemented

SCOPE OF WORK

The City is seeking an integrated “off-the-shelf” solution that will meet its core requirements out of the box with minimal modifications. The goal of this strategy is to optimize system utilization for all users, improve response times, reduce errors, reduce manual efforts, improve analytical capabilities, and improve customer service. The City intends to minimize its total cost of ownership without any degradation in performance and level of service, and to implement a system in which it can remain on the system’s upgrade path with minimal cost and business impact. This system must be scalable and integrate fully with the Stormwater modeling system which is being developed and implemented into GIS.

3.13 Required Services

3.13.1 Project Management

3.13.2 Hardware consulting, design, and installation

3.13.3 Installation and Configuration of all Components

3.13.4 Complete system testing of all installed components

3.13.5 Integration and Interface Development

3.13.6 Knowledge Transfer to Staff

3.13.7 Operational Redesign Assistance

3.13.8 Data Conversion Upon Request or when Required

3.13.9 Ongoing Support and Maintenance Services

3.13.10 Training Services – Train the Trainer and Administrator Training for all components for the staff identified , including Security configuration (users, groups, access and functionality rights)

3.14 General Requirements / Asset Management & Computerized Maintenance Management System (CMMS)

3.14.1 Asset Record Tracking

3.14.2 Asset Accounting (Budgeting, Depreciation and Forecasting)

3.14.3 Condition Assessment

3.14.4 Risk/Financial Analysis

- 3.14.5 Asset Lifecycle Management
- 3.14.6 Human Capital Management
- 3.14.7 Field Inventory and Data Collection
- 3.14.8 Dynamic Master Planning Capacity
- 3.14.9 Capital Planning Functionality
- 3.14.10 Planning & Reporting – Capacity, Management, Operation, and Maintenance (CMOM) Program.
- 3.14.11 Preventive and Planned Maintenance/Scheduling (To assist with CIP project planning)
- 3.14.12 Work Management (Work Order Generation, Work Planning Tools, etc.)
- 3.14.13 Work Order Billing
- 3.14.14 Service/Customer Relationship Management Including Customer Portal (Issue or incident logging)
- 3.14.15 Comprehensive audit trail and reporting capability
- 3.14.16 Budget Model to Assist with Funding Requests
- 3.14.17 Parts/Supplies Inventory

3.15 Technical Requirements:

- 3.15.1 ESRI GIS Integration
- 3.15.2 GIS Mapping
- 3.15.3 Interface Flexibility/Customization
- 3.15.4 Open Platform API and SDK
- 3.15.5 Comprehensive and granular security

Fleet maintenance and management for vehicles and other “rolling” assets are not in the scope of this project, but we would like to know if your product has fleet maintenance as a module or functionality. For a comprehensive list of system features and requirements, see “Form 3 – Functional Requirements”

Estimated users and future users by Departments:

| DEPARTMENT/DIVISION | # of NAMED USERS |
|---|---------------------------------|
| Public Works (PW) | |
| PW Distribution and Collection | 171 |
| PW Stormwater | 23 |
| PW Treatment | 99 |
| PW Administration | 40 |
| PW Sustainability | 4 |
| PW Engineering | 60 |
| Fleet Services (includes 3 from onsite Proposer) | 6 |
| Parks & Recreation | |
| Parks Operations | |
| Parks Facility Services | |
| Information Technology | |
| Information Technology (includes GIS) | 6 |

PROCUREMENT SCHEDULE

The procurement schedule for this project is as follows:

Note: The City reserves the right to adjust this schedule as necessary.

| MILESTONE | DATE |
|--------------------------------------|---|
| Pre-Proposal Conference | April 20, 2017 |
| Questions (if any) Due | May 11, 2017 |
| Proposal Responses Due – 2:00 pm EST | May 18, 2107 |
| Contract Negotiations Complete | TBD |
| Supplier Selection/Award | TBD |
| Contract Signed | Upon successful completion of scripted demonstrations and due diligence |
| Work Begins | The project is expected to start within 45 days of contract execution. |
| Go-Live | To be mutually agreed upon |

SECTION IV – SUBMITTAL REQUIREMENTS

4.1 Instructions

- 4.1.1** Although proposals are accepted 'hard copy', the City of Fort Lauderdale uses Bidsync (www.bidsync.com) to administer the competitive solicitation process, including but not limited to soliciting proposals, issuing addenda, responding to questions / requests for information. There is no charge to register and download the RFP from Bidsync. Proposers are strongly encouraged to read the various vendor Guides and Tutorials available in Bidsync well in advance of their intention of submitting a proposal to ensure familiarity with the use of Bidsync. The City shall not be responsible for a Proposer's inability to submit a proposal by the end date and time for any reason, including issues arising from the use of Bidsync.
- 4.1.2** Careful attention must be given to all requested items contained in this RFP. Proposers are invited to submit proposals in accordance with the requirements of this RFP. Please read entire solicitation before submitting a proposal. Proposers must provide a response to each requirement of the RFP. Proposals should be prepared in a concise manner with an emphasis on completeness and clarity. Notes, exceptions, and comments may be rendered on an attachment, provided the same format of this RFP text is followed.
- 4.1.3** All information submitted by Proposer shall be typewritten or provided as otherwise instructed to in the RFP. Proposers shall use and submit any applicable or required forms provided by the City and attach such to their proposal. Failure to use the forms may cause the proposal to be rejected and deemed non-responsive.
- 4.1.4** Proposals shall be submitted by an authorized representative of the firm. Proposals must be submitted in the business entities name by the President, Partner, Officer or Representative authorized to contractually bind the business entity. Proposals shall include an attachment evidencing that the individual submitting the proposal, does in fact have the required authority stated herein.
- 4.1.5** All proposals will become the property of the City. The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes. Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion is a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold harmless the city and the city's officers, employees, and agent, against any loss or damages incurred by any person or entity as a result of the city's treatment of records as public records. In the event of Contract award, all documentation produced as part of the Contract shall become the exclusive property of the City.

- 4.1.6** One (1) original and four (4) copies plus One (1) electronic (soft) flash drive only copy of your proposal shall be delivered in a sealed package with the RFP number, due and open date, and RFP title clearly marked on the outside by the due date and time (deadline) to the address specified in Section I, 1.2 – Submission Deadline. It is the sole responsibility of the respondent to ensure their proposal is received on or before the date and time stated, in the specified number of copies and in the format stated herein.
- 1.1.7** By submitting a response Proposer is confirming that the firm has not been placed on the convicted vendors list as described in Section §287.133 (2) (a) Florida Statutes; that the only person(s), company or parties interested in the proposal as principals are named therein; that the proposal is made without collusion with any other person(s), company or parties submitting a proposal; that it is in all respects fair and in good faith, without collusion or fraud; and that the signer of the proposal has full authority to bind the firm.
- 1.1.8** All proposals will become the property of the City. The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes. Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the Proposer agrees to defend, indemnify, and hold harmless the city and the city's officers, employees, and agent, against any loss or damages incurred by any person or entity as a result of the city's treatment of records as public records. In the event of Contract award, all documentation produced as part of the Contract shall become the exclusive property of the City.

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT. CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: (954-828-5002, PRRCONTRACT@FORTLAUDERDALE.GOV, CITY CLERK'S OFFICE, 100 NORTH ANDREWS AVENUE, FORT LAUDERDALE, FLORIDA 33301)

4.2 Contents of the Proposal

The City deems certain documentation and information important in the determination of responsiveness and for the purpose of evaluating proposals. Proposals should seek to avoid information in excess of that requested, must be concise, and must specifically address the issues of this RFP. The City prefers that proposals be no more than fifty (50) pages double-sided, be bound in a soft cover binder, and utilize recyclable materials as much as practical. Elaborate binders are neither necessary nor desired. Please place the labeled DVD/CD in a paper sleeve. The proposals shall be organized and divided into the sections indicated herein. These are not inclusive of all the information that may be necessary to properly evaluate the proposal and meet the requirements of the scope of work and/or specifications. Additional

documents and information should be provided as deemed appropriate by the respondent in proposal to specific requirements stated herein or through the RFP.

4.2.1 Table of Contents

The table of contents should outline in sequential order the major areas of the submittal, including enclosures. All pages should be consecutively numbered and correspond to the Table of Contents.

4.2.2 Executive Summary

Each Offeror must submit an executive summary that identifies the business entity, its background, main office(s), and office location that will service this contract. Identify the officers, principals, supervisory staff and key individuals who will be directly involved with the work and their office locations. The executive summary should also summarize the key elements of the proposal.

4.2.3 Experience and Qualifications

Indicate the firm's number of years of experience in providing the professional services as it relates the work contemplated. Provide details of past projects for agencies of similar size and scope, including information on your firm's ability to meet time and budget requirements. Indicate the firm's initiatives towards its own sustainable business practices that demonstrate a commitment to conservation. Indicate business structure, IE: Corp., Partnership, LLC. Firm should be registered as a legal entity in the State of Florida; Minority or Woman owned Business (if applicable); Company address, phone number, fax number, E-Mail address, web site, contact person(s), etc. Relative size of the firm, including management, technical and support staff; licenses and any other pertinent information shall be submitted.

4.2.4 Approach to Scope of Work

Provide in concise narrative form, your understanding of the City's needs, goals and objectives as they relate to the project, and your overall approach to accomplishing the project. Give an overview on your proposed vision, ideas and methodology. Describe your proposed approach to the project. As part of the project approach, the proposer shall propose a scheduling methodology (time line) for effectively managing and executing the work in the optimum time. Also provide information on your firm's current workload and how this project will fit into your workload. Describe available facilities, technological capabilities and other available resources you offer for the project.

4.2.5 References

Provide at least three references, preferably government agencies, for projects with similar scope as listed in this RFP. Information should include:

- Client Name, address, contact person telephone and E-mail addresses.
- Description of work.
- Year the project was completed.
- Total cost of the project, estimated and actual.

Note: Do not include City of Fort Lauderdale work or staff as references to demonstrate your capabilities. The Committee is interested in work experience and references other than the City of Fort Lauderdale.

4.2.6 Minority/Women (M/WBE) Participation

If your firm is a certified minority business enterprise as defined by the Florida Small and Minority Business Assistance Act of 1985, provide copies of your certification(s). If your firm is not a certified M/WBE, describe your company's previous efforts, as well as planned efforts in meeting M/WBE procurement goals under Florida Statutes 287.09451.

4.2.7 Subconsultants

Proposer must clearly identify any Subconsultants that may be utilized during the term of this contract.

4.2.8 Required Forms

a. Proposal Certification

Complete and attach the Proposal Certification provided herein.

b. Cost Proposal

Provide firm, fixed, costs for all services/products using the form provided in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

c. Non-Collusion Statement

This form is to be completed, if applicable, and inserted in this section.

d. Contract Payment Method

This form must be completed and returned with your proposal. Proposers must presently have the ability to accept these credit cards or take whatever steps necessary to implement acceptance of a card before the start of the contract term, or contract award by the City.

e. Sample Insurance Certificate

Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for the required coverage and limits.

f. Business License

Evidence that your firm and/or persons performing the work are licensed to do business in the State of Florida

SECTION V – EVALUATION AND AWARD

5.1 Evaluation Procedure

5.1.1 Bid Tabulations/Intent to Award

Notice of Intent to Award Contract/Bid, resulting from the City's formal solicitation process, requiring City Commission action, may be found at http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm. Tabulations of receipt of those parties responding to a formal solicitation may be found at <http://www.fortlauderdale.gov/purchasing/bidresults.htm>, or any interested party may call the Procurement Office at 954-828-5933.

5.1.2 Evaluation of proposals will be conducted by an Evaluation Committee, consisting of a minimum of three members of City Staff, or other persons selected by the City Manager or designee. All committee members must be present at scheduled evaluation meetings. Proposals shall be evaluated based upon the information and references contained in the responses as submitted.

- 5.1.3** The Committee may short list proposals that it deems best satisfy the weighted criteria set forth herein. The committee may then conduct interviews and/or require oral presentations to include demonstrations of each firm's software from the short listed Proposers. The Evaluation Committee shall then re-score and re-rank the short listed firms in accordance with the weighted criteria.
- 5.1.4** The City may require visits to the Proposer's facilities to inspect record keeping procedures, staff, facilities and equipment as part of the evaluation process.
- 5.1.5** The final ranking and the Evaluation Committee's recommendation may then be reported to the City Manager for consideration of contract award.

5.2 Evaluation Criteria

- 5.2.1** The City uses a mathematical formula to determine the scoring for each individual responsive and responsible firm based on the weighted criteria stated herein. Each evaluation committee member will rank each firm by criteria, giving their first ranked firm as number 1, the second ranked firm a number 2, and so on. The City shall average the ranking for each criterion, for all evaluation committee members, and then multiply that average ranking by the weighted criteria identified herein. The lowest average final ranking score will determine the recommendation by the evaluation committee to the City Manager.

5.2.2 Weighted Criteria

| EVALUATION CRITERIA | Weight |
|---|---------------|
| Project Plan, Methodology and Approach | 20% |
| Product Functionality, Scalability, and Configurability | 25% |
| Financial Capability and Project Capacity | 10% |
| References, Experience and Qualifications of Teams | 15% |
| Project Fee Costs | 30% |
| | |
| TOTAL PERCENT AVAILABLE: | 100% |

5.3 Contract Award

The City reserves the right to award a contract to that Proposer who will best serve the interest of the City. The City reserves the right, based upon its deliberations and in its opinion, to accept or reject any or all proposals. The City also reserves the right to waive minor irregularities or variations of the submittal requirements and RFP process.

SECTION VI – FEE PROPOSAL SUMMARY PAGE (See Form 2 for Fee Proposal Details)**Proposer Name:** _____

Proposer agrees to supply the products and services at the prices bid below in accordance with the terms, conditions and specifications contained in this RFP.

Cost to the City: Proposer must quote firm, fixed, costs for all services/products identified in this request for proposal. These firm fixed costs for the project include any costs for travel and miscellaneous expenses. No other costs will be accepted.

Notes: Attach a breakdown of costs including but not limited to labor, equipment, materials and parts. Include all cost under Item 1 below, add the letter in front of the dollar sign for the solution your are proposing. i.e. b. \$_____.

1. a. Software (On-Premises City Hosted) \$ _____

b. Software as a Service \$ _____

c. Combination of Hosted and Service \$ _____

2. Hardware \$ _____

3. Implementation Cost \$ _____

4. Training Cost \$ _____

5. Additional Equipment/Material (List in Detail) \$ _____

6. List and Explain Any Other Cost not Included \$ _____

Total Project Cost \$ _____

Submitted by:_____
Name (Printed)_____
Signature_____
Date_____
Title

Form 1 – General Supplier Information

| Proposer and Software Information | |
|---|--|
| 1. Contact Information | |
| a. Company Name | |
| b. Name and Title of Contact Person | |
| c. Company Address | |
| d. Telephone | |
| e. Email Address | |
| f. Company Website | |
| 2. Regional Offices and Staff | |
| a. Describe whether your organization is local, regional, national or international. | |
| b. Regional office servicing this engagement | |
| c. Describe the range of services provided by the office servicing the engagement and # of employees. | |
| 3. Company Information | |
| a. Briefly describe your company and the characteristics that set your company apart in terms of service, methodology, approach, and software, etc. | |
| b. Briefly describe how you will meet our requirements and maximize our return on investment. | |
| c. Year Founded | |
| d. Private vs. Public (Listing Exchange and Listing Code) | |
| e. Fiscal Year End | |
| f. Revenue: Current Year | |
| g. Revenue: Prior Year | |

| | |
|---|--|
| h. Net Income/Loss: Current Year | |
| i. Net Income/Loss: Prior Year | |
| j. % of gross revenue generated by proposed software & related maintenance and services. | |
| k. Parent Company (If separate) | |
| l. Describe parent company's relationship with the proposing party. | |
| m. Mergers and Acquisitions (Changing business, name changes, acquisitions/mergers, etc.) | |
| n. Describe if your organization is international, national, regional or local. Please explain. | |
| o. Describe how the company has grown. Organically or thru acquisition, thru mergers, etc.? | |
| p. Are there any planned acquisitions or mergers in the future? | |
| q. Disclose any recent litigation (and outcomes) and litigation currently underway. | |
| | |
| 4. Staff (List Staff and Sub-Consultants Separately) Employees | |
| a. Total Worldwide | |
| b. Total in U.S. | |
| c. Staff dedicated to the proposed software | |
| d. U.S. staff dedicated to the proposed software | |
| e. Full-time employees in: <ul style="list-style-type: none"> - Implementation and training - Customer service - Technical/Development - Administrative - Other (note relevant staff): | |
| 5. Number of Customers Using the Proposed Software | |
| a. Total Worldwide | |
| b. Total in U.S. | |

| | |
|--|--|
| c. Florida Cities using the proposed software | |
| d. Other cities using the proposed version | |
| 6. List your City customers with similar requirements installed with your proposed solution | |
| 7. Supplier's Implementation Model – Direct, VAR, Implementation Partner, etc. | |
| 8. Version Schedule | |
| a. Current version and general availability release date | |
| b. Proposed version & general availability release date | |
| c. Estimated release date for next version | |
| d. Typical release schedule & time to install | |
| e. Number of prior versions supported | |
| 9. User protection plans Briefly describe what user protection plans you have. For example: a. Source code held in Escrow b. No charge to migrate to similar new software (e.g. new technology) c. Other options | |
| 10. We require having development, back-up, training, testing and archival copies of the software in addition to the production copy. Is this provided as standard with your Software? If there is a cost, please list in your proposal | |
| 11. Briefly describe your customer service and support. a. What options and the cost b. What is covered and what isn't c. Customer support hours d. When do the software maintenance agreement does goes into effect? | |

| | |
|---|--|
| 12. Briefly describe your training: <ul style="list-style-type: none"> a. Approach and philosophy b. Options (Learning center, interactive Web courses, CD/DVD, onsite, train-the-trainer, etc.) c. Prices/rates | |
| | |
| 13. Company Qualifications | |
| <ul style="list-style-type: none"> a. Three or more years of related EAM system experience. Briefly describe. | |
| <ul style="list-style-type: none"> b. Experience working with cities of our size. Briefly describe. | |
| <ul style="list-style-type: none"> c. Briefly describe your experience integrating with ESRI GIS. | |
| Contract and Agreements | |
| 14. Contract Termination for Default Please list all incidents in the past 5 years in which you have had a contract terminated for default. Termination for default is defined as notice to stop performance due to your non-performance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined you to be in default. Please provide: <ul style="list-style-type: none"> a. Full details of all terminations for default b. The other party's name, address and telephone c. Your position on the matter | |
| 15. Contract termination before contract completion for convenience, non-performance, non-allocation of funds, etc. Please list all incidents in the past 5 years in which you have had a contract terminated before completion (e.g. for convenience non-performance, non-allocation of funds or any other reason) Please provide: <ul style="list-style-type: none"> a. Full details of all such terminations b. The other party's name, address and telephone c. Your position on the matter | |
| 16. Capacity and Capability | |

| | |
|--|--|
| <p>Give an exact schedule of the projects that are anticipating, pending, in progress and nearing completion</p> <p>Please list all projects in that are in progress, pending start dates, near completion and that I anticipate with the next 5 months to three (3) years.</p> | |
| | |

| | |
|--|--|
| <p>Proposed Implementation Partner/System Integrator/Project Manager/VAR Information</p> | |
| <p>1. Contact Information</p> | |
| a. Company Name | |
| b. Name and Title of Contact Person | |
| c. Company Address | |
| d. Telephone | |
| e. Email Address | |
| f. Company Website | |
| <p>2. Regional Offices and Staff</p> | |
| a. Describe whether your organization is local, regional, national or international. | |
| b. Regional office performing this engagement. | |
| c. Describe the range of services provided by the office performing the engagement and # of employees. | |
| <p>3. Company Information</p> | |
| a. Briefly describe your company and the characteristics that set your company apart. | |
| b. How many years of experience do you have implementing the proposed software? | |
| c. Briefly describe how you will meet our requirements and maximize our return on investment. | |

| | |
|---|--|
| d. Year Founded | |
| e. Private vs. Public (Listing Exchange and Listing Code) | |
| f. Fiscal year end | |
| g. Revenue: Current Year | |
| h. Revenue: Prior Year | |
| i. Net Income/Loss: Current Year | |
| j. Net Income/Loss: Prior Year | |
| k. % of gross revenue generated by proposed software & related maintenance and services. | |
| l. Parent Company (If separate) | |
| m. Describe parent company's relationship with the proposing party. | |
| n. Genealogy of Organization (Changing business, name changes, acquisitions/mergers, etc.) | |
| o. Describe if your organization is international, national, regional or local. Please explain. | |
| p. Describe how the company has grown. "Organically," thru acquisition, thru mergers, etc.? | |
| q. Are there any planned acquisitions or mergers in the future? | |
| r. Disclose any recent litigation (and outcomes) and litigation currently underway. | |
| 4. # of Employees | |
| a. Total Worldwide | |
| b. Total in U.S. | |
| c. # dedicated to the proposed software | |
| d. U.S. # dedicated to the proposed software | |
| 5. Number of Customers Using the Proposed Software NOTE: These are the customers that you implemented | |
| a. Total Worldwide | |

| | |
|--|--|
| b. Total in U.S. | |
| c. # cities using the proposed software | |
| d. # cities using the proposed version | |
| e. # of cities in Washington using the proposed software | |
| 6. List your City customers with similar requirements installed with the proposed solution. Note: These are the customers that you implemented. | |
| 7. Target User Profile for This Software Where size are the majority of your customers using the proposed software are)? E.g. Number of citizens and operating budget. | |
| 8. Software Supplier Relationship and Implementation Model Briefly describe your relationship with the software supplier, formal software training, development work, etc. | |
| 9. Have you developed any add-on products to the proposed software? If so, please explain. | |
| 10. Briefly describe your customer service and support. a. What options are available and what is the cost b. What is covered and what isn't | |
| | |
| 11. Briefly describe your training: a. Does the Software Supplier provide training or are you responsible for training? b. Approach and philosophy c. Options (Learning center, interactive Web courses, CD/DVD, onsite, train-the-trainer, etc.) d. Prices/rates | |
| 12. Company Qualifications | |
| a. Three or more years of related EAM system experience. Briefly describe. | |

| | |
|---|--|
| | |
| b. Experience working with cities of our size. Briefly describe. | |
| c. Briefly describe your experience integrating the proposed solution with: - QAlert Cayenta (If needed) | |
| d. Briefly describe your experience integrating the proposed software with ESRI ArcGIS. | |
| 13. Contract Termination for Default Please list all incidents in the past 5 years in which you have had a contract terminated for default. Termination for default is defined as notice to stop performance due to your non-performance or poor performance; and the issue was either (a) not litigated or (b) litigated, and such litigation determined you to be in default. Please provide: <ul style="list-style-type: none"> a. Full details of all terminations for default b. The other party's name, address and telephone c. Your position on the matter | |
| 14. Contract termination before contract completion for convenience, non-performance, non-allocation of funds, etc. Please list all incidents in the past 5 years in which you have had a contract terminated before completion (e.g. for convenience non-performance, non-allocation of funds or any other reason) Please provide: <ul style="list-style-type: none"> a. Full details of all such terminations b. The other party's name, address and telephone c. Your position on the matter | |

FORM 2: FEE PROPOSAL

INSTRUCTIONS

There are several pricing forms to be completed:

1. On-Premises City Hosted * (See 8 Below)
2. Hosted or Software-as-a-Service
3. Or a combination of the 1 and 2 above

If you only provide one option, please complete the applicable form. If you provide both options please complete both forms. Also note if there are any other options that you provide and complete an applicable form for those options.

| On-Premises City Hosted License Pricing | | |
|---|---|--|
| 1 | Briefly describe your estimating approach and the basis for your proposed pricing. | |
| 2 | Briefly describe your fee structure for professional services. | |
| 3 | Discuss how you will discount the software, maintenance/support and services rate for us. | |
| 4 | Prices and rates must be locked in for three years. | |
| 5 | Provide a summary of costs excluded from this proposal | |
| 6 | Provide a preliminary payment schedule, keeping in mind that we are not allowed to pay for goods and services in advance. There is a retainer of 10% to be paid upon final acceptance by the City. Final acceptance: After go-live (the first production use of the software); the City will have 60 days to test the software in a production environment and to develop a list of non-conforming elements to be corrected by the supplier. Final acceptance will take place when the City agrees in writing that all of the non-conforming elements have been corrected except for minor or inconsequential errors. | |
| 7 | We own a site license for ESRI ArcGIS products and do not plan to pay for additional licenses as part of this acquisition. Can you honor that, and if not, why not? | |
| 8 | *List hardware and other any other software or items required for the City to host. Also suggest/recommend a backend server configuration with the amount and whether they are virtual or physical and the storage requirements. | |
| | | |

| SOFTWARE LICENSE | \$ | ASSUMPTIONS |
|--|----|-------------|
| Asset Record Tracking | | |
| Asset Lifecycle Management | | |
| Parts/Supplies Inventory | | |
| Preventive Maintenance/Scheduling | | |
| Work Management | | |
| Work Order Billing | | |
| Reporting | | |
| ESRI ArcGIS integration | | |
| Other: (Describe) | | |
| List any optional modules required outside of the basic foundational modules not included in the core module price | | |
| | | |
| Sub-Total: Core Modules | | |
| Optional: (Describe) | | |
| | | |
| | | |
| Sub-Total: Software License | | |
| | | |
| | | |
| IMPLEMENTATION | \$ | ASSUMPTIONS |
| Implementation | | |
| Data Conversion | | |
| Training | | |
| Data Collection | | |
| Integration | | |
| Customization | | |
| Travel Expenses | | |
| Other: (Describe) | | |
| Sub-Total: Implementation | | |
| Ratio: Implementation Cost to License Cost (E.g. 2:1) | | |
| | | |

| ANNUAL MAINTENANCE and SUPPORT | \$ | ASSUMPTIONS |
|---|-----------|--|
| Year 1 | | |
| Year 2 | | |
| Year 3 | | |
| Year 4 | | |
| Year 5 | | |
| Year 6 | | |
| Year 7 | | |
| Year 8 | | |
| Sub-Total: Maintenance & Support | | |
| Maintenance & Support Cost Calculation Formula (e.g. 18% of purchase price) | | |
| Include any Service Level Agreements and Terms | | |
| GRAND TOTAL | | License, Implementation, Eight (8) Years, Maintenance |

| Hosted Or Software-as-a-Service (SAAS) Pricing | | |
|---|---|--|
| 1 | Are you proposing a Hosted or Software-as-a Service (SaaS) option? Briefly describe. You may attach a copy or be prepared to provide upon request. | |
| 2 | Briefly describe your estimating approach and the basis for your proposed pricing. | |
| 3 | Briefly describe your fee structure for professional services. | |
| 4 | Discuss how you will discount the subscription, maintenance/support and service rate. | |
| 5 | Prices and rates must be locked in for three years. | |
| 6 | Provide a summary of costs excluded from this proposal | |
| 7 | Provide a preliminary payment schedule, keeping in mind that we are not allowed to pay for goods and services in advance. We also require a hold back of 20% to be paid upon final acceptance by the City. Final acceptance: After go-live (the first production use of the software); the City will have 60 days to test the software in a production environment and to develop a list of non-conforming elements to be corrected by the supplier. Final acceptance will take place when the City agrees in writing that all of the non-conforming elements have been corrected except for minor or inconsequential errors. | |
| 8 | We own a site license for ESRI ArcGIS products and do not plan to pay for additional licenses as part of this acquisition. Can you honor that, and if not, why not? | |
| 9 | For the hosted or SaaS state the required average bandwidth per concurrent users (175/200) | |

| HOSTED/SAAS SUBSCRIPTION | ANNUAL SUBSCRIPTION \$ | ASSUMPTIONS |
|--|------------------------------|-------------|
| Asset Record Tracking | | |
| Asset Lifecycle Management | | |
| Parts/Supplies Inventory | | |
| Preventive Maintenance/Scheduling | | |
| Work Management | | |
| Work Order Billing | | |
| Reporting | | |
| ESRI ArcGIS integration | | |
| Other: (Describe) | | |
| List any optional modules required outside of the basic foundational modules not included in the core module price | | |
| Sub-Total: Core Modules | | |
| Optional: (Describe) | | |
| | | |
| Sub-Total: Annual Subscription | | |
| Describe any commitments. E.g. Can we terminate at any time? Is there a 1 year commitment? Etc. | | |
| SERVICE ELEMENTS | ANNUAL SUBSCRIPTION \$ | ASSUMPTIONS |
| Infrastructure | | |
| Equipment | | |
| Telecommunications & Network | | |
| Operations Support | | |
| Client Environment Support | | |
| Disaster Recovery | | |
| Other: (Describe) | | |
| Sub-Total: Annual Service Elements Subscription | | |
| IMPLEMENTATION | \$ | ASSUMPTIONS |
| Implementation | | |

| | | |
|---|-----------|--|
| Data Conversion | | |
| Data Collection and Entry | | |
| Data Review and Analysis | | |
| Training | | |
| Integration | | |
| Customization | | |
| Travel Expenses | | |
| Other: (Describe) | | |
| | | |
| Sub-Total: Implementation | | |
| Ratio: Implementation Cost to License Cost (E.g. 2:1) | | |
| ANNUAL MAINTENANCE and SUPPORT | \$ | ASSUMPTIONS |
| Software | | |
| Hardware | | |
| Other: (Describe) | | |
| | | |
| Sub-Total: Maintenance & Support | | |
| Maintenance & Support Cost Calculation Formula (e.g. 10% of purchase price) | | |
| | | |
| GRAND TOTAL | | 1st Year Subscription, Service Elements, Implementation, Maintenance & Other |

If your hosted pricing does not fit into the format above, present it in a format that fits your model, but please present it in a format that is easy for us to understand.

FORM 3 - FUNCTIONAL REQUIREMENTS

INSTRUCTIONS FOR COMPLETING FUNCTIONAL REQUIREMENTS

1) Proposer Response

For each numbered line item requirement, the Proposer must indicate Y, 3P, C, F, or N with an "X" in the Vendor Response column, according to the following legend:

| | |
|-----------|---|
| Y | Fully supported by the current release of the software. |
| 3P | Supported with third party software (i.e. software not directly owned or controlled by the Proposer submitting the proposal). |
| C | Customization is required to meet the requirement (e.g. changes to the underlying code must be made; a new table must be created; etc.) This causes additional upgrade work in order to implement new versions or upgrades. |
| F | Future functionality: Supported in the next release of the software. |
| N | Not supported. |

2) If the Proposer responds with 3P, C, or F, the Proposer must provide additional information in the comments column:

- For "3P", the Proposer must explain what third party software application or service is required, any integration requirements, and the Proposer's relationship with this third party.
- For "C", the Proposer must explain the nature and amount of customization required, and experience with the same or similar modifications.
- For "F", the Proposer must explain the functionality in the new release, the expected general availability release timing and provide surety that the functionality will be included.

3) The Proposer must also identify which module(s) the required functionality is part of in the final column (as applicable).

The information must be completed and submitted in the format provided. We must be fully provided with all associated software, modules, equipment, and technology platforms, and any other information that is required to obtain a fully functioning system. It must be clearly delineated what is in the software package as standard and what is optional. Any module shown and construed to be a part of the basic package that is not delineated will be considered standard.

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|---|-----------------------------|
| | | Summary of Module/Functionality Footprint Requirements | | | |
| 1 | R | Asset Record Tracking | | | |
| 2 | R | Asset Lifecycle Management | | | |
| 3 | R | Parts/Supplies Inventory | | | |
| 4 | R | Preventive Maintenance (PM) Planning & Scheduling | | | |
| 5 | R | Work Management | | | |
| 6 | R | Customer Service Requests | | | |
| 7 | R | Billing | | | |
| 8 | R | Reporting | | | |
| 9 | R | Risk Analysis | | | |
| 10 | R | Capacity, Management, Operations, and Maintenance CMOM Planning & Reporting | | | |
| | | General Features | | | |
| 11 | R | User defined and searchable fields, and user customizable menus and screens/forms to facilitate a more focused user interface for each group of end users. | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. <u>Proposer Response Legend:</u> Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|--|--|--|--|--|-----------------------------|
| 12 | R | Intuitive system navigation with “click” drill down. Minimize the # of screens and clicks needed to get to the required activity or record. | | | | | | | |
| 13 | R | Ability to access in the field on a variety a devices, including laptops, tablets and smartphones. Mobile version of the software must be a lightweight, user friendly version of the application. | | | | | | | |
| 14 | I | Drill down to transaction detail throughout all modules and across to other modules. | | | | | | | |
| 15 | R | Multi directional electronic approval routing. | | | | | | | |
| 16 | I | Customer definable rules-based workflow rules for sequential, broadcast, and event-based approval routing and record distribution with flags, alerts, triggers and actions based on defined events and thresholds. | | | | | | | |
| 17 | I | System must support interface, content, and workflow customizations by a trained system administrator without programming. | | | | | | | |
| 18 | I | Unlimited notes or text fields. | | | | | | | |
| 19 | R | Full audit trail and history throughout all modules: Date, time, who made the change, retain what was changed, and show new record. | | | | | | | |
| 20 | R | Customer definable and changeable forms, letters and notifications with context sensitive | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|--|--|--|--|--|---|-----------------------------|
| | | access. (E.g. condition assessment, homeowner notifications, etc.) | | | | | | | | |
| 21 | I | Role-based, user configurable menus, screens, fields, and reports. | | | | | | | | |
| 22 | I | Context sensitive help. | | | | | | | | |
| 23 | I | Global updates; ability to pick a field where update should be made and have that field update across all like records. | | | | | | | | |
| 24 | I | Real-time system update and data availability. | | | | | | | | |
| 25 | N | Ability to have the history from QAlert available. | | | | | | | | |
| 26 | I | Work on multiple open screens at one time from a single sign-on. | | | | | | | | |
| 27 | I | Ability to have split-screen. E.g. One side of screen has map, other side has new Work Order form. | | | | | | | | |
| 28 | I | System must have a dashboard style page configurable by each user for viewing assigned or monitored work activities. Should include: cost summaries, to do lists, charts, graphs, maps, reports, etc. should be configurable based on any number of search parameters defined by the user. | | | | | | | | |
| 29 | R | System must be able to develop maintenance schedule from inventory criteria | | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|---|-----------------------------|
| | | Technology | | | |
| 30 | I | Preferably database should be Microsoft SQL Server or Oracle database. If not what RDBMS and versions are used? | | | |
| 31 | | Identify server/platform. Discuss options. | | | |
| 32 | | Indicate platforms supported and % of installs for each | | | |
| 33 | | <ul style="list-style-type: none"> Indicate databases supported and % of installs for each | | | |
| 34 | | <ul style="list-style-type: none"> Indicate source code language | | | |
| 35 | E | <ul style="list-style-type: none"> Hosted/ASP solution. Briefly discuss if this is an option or future option and, if so, describe. | | | |
| 36 | I | Web-based architecture with published open Application Program Interfaces (API's.) Briefly describe if you are fully Web-based, and what you have for APIs. Are your APIs configurable by customers to use for new or changed integration or do they require your professional services to change? | | | |
| 37 | I | Supports Microsoft Active Directory. Single sign-on integration with Active Directory. | | | |
| 38 | I | Supports virtual server environment utilizing VMWare | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|--|--|--|--|--|---|-----------------------------|
| 39 | I | Row lock security. | | | | | | | | |
| 40 | I | Fully supports/compliant with Service Oriented Architecture (SOA). Please explain/discuss. | | | | | | | | |
| 41 | R | Attach electronic files (e.g. JPEG, PDF, Word, wav, MP3, WMV, TIF, etc.) to various records and fields such as for a specific asset. List all file types supported. | | | | | | | | |
| 42 | I | Attach AutoCAD DWG files to various records, fields and assets. Please explain/describe if you have the ability to open and read the DWG files from your proposed software. | | | | | | | | |
| 43 | R | Email distribution of reports, approval requests, etc. from within the system. | | | | | | | | |
| 44 | I | Bi-directional integration with Microsoft Office (especially Excel and Word) | | | | | | | | |
| 45 | R | Remote access. Support for Mobile Technologies IOS and Android | | | | | | | | |
| 46 | I | Mobile technology interfaces should be customizable to the user role and provide a simple and direct platform so in-field crews have a minimal number of work steps to complete updates and check-ins. | | | | | | | | |
| 47 | I | Describe any integration with CCTV to track video information real time to specific asset locations. | | | | | | | | |
| 48 | I | Describe your touch screen capability for field data entry and mobile technology | | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|--|---|---|-----------------------------|
| | | compatibility. | | | |
| 49 | I | .NET architecture. Briefly describe if you are fully .NET or only in certain modules. If not .NET what programming functionality is used (e.g. Java)? | | | |
| 50 | R | Workflow capability built on Windows Workflow Foundation (WF45) -Describe application and user security features/capabilities. Indicate any special security features (e.g. user security, function security, file security, field level security, etc.) provided by the software. | | | |
| 51 | I | Compatibility with GPS/AVL technology in field vehicles. | | | |
| | R | Data Conversion / Retention | | | |
| 52 | R | Ability to convert data from other EAM/CMMS systems (Cayenta, QScend QAlert, Hansen). Please list what systems you have converted data from. | | | |
| 53 | | Please describe your Data Retention capabilities. Can records, attachments be flagged with different retention schedules? | | | |
| | R | Training | | | |
| 54 | R | Ability to provide in-person training on all modules selected. | | | |
| 55 | R | Ability to provide in-person system administration training. | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|---|---|---|-----------------------------|
| | R | Interfaces / Integration | | | |
| 56 | I | Experience integrating with external applications such as Cayenta Yes/No Kronos Yes/No Laserfiche Yes/No BuySpeed Yes/No Lawson Financial Yes/No | | | |
| 57 | E | Utility Billing: Software is Cayenta What experience do you have with integrating or interfacing with it? | | | |
| 58 | R | Water and Sewer Hydraulic Modeling: Software interfacing with Innovyze, InfoWater Suite and InfoSWMM, respectively (ArcGIS10.1 or higher compatible) | | | |
| 59 | I | Do you have a client portal, or the ability and experience to integrate with one? Move to customer relations area | | | |
| | R | GIS Integration | | | |
| 60 | R | The system shall utilize the City's enterprise geodatabase as the asset inventory. | | | |
| 61 | R | The system must use non-redundant asset data storage with no reliance views, data mapping or synchronization. | | | |
| 62 | R | System must support Esri ArcGIS Sever 10.4 or current version and maintain compatibility with the most current version of ESRI GIS software within 6-months of an ESRI version release. | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. <u>Proposer Response Legend:</u> Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|---|---|--|--|--|--|--|-----------------------------|
| 63 | I | The system shall utilize inherent Esri spatial functions such as system trace, valve isolation, etc. | | | | | | | |
| 64 | I | System should be designed to work primarily with GIS data, where geographic features (e.g. pipes) represent assets. It must integrate with the City’s existing enterprise geodatabase, ArcGIS Server software and ArcGIS Online. The software should not require converting to a different format. | | | | | | | |
| 65 | R | System MUST be non-modular for asset types and functional groups. Core system must be configurable for unlimited asset types and asset groups without additional modules or licensing cost. | | | | | | | |
| 66 | R | System should utilize the Esri geodatabase as the only asset database/repository and link to it out-of-the-box without additional add-ons or software licensing. All asset geometry and attributes must reside in the geodatabase and should not require middleware, modules, or synchronization with the work management database. | | | | | | | |
| 67 | R | System should not set limits on the number of assets or the size or complexity of the asset data, other than those imposed by the underlying Esri software | | | | | | | |
| 68 | R | System should support and detect relationship classes within the GIS | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|----|---|---|---|--|--|--|--|--|---|-----------------------------|
| 69 | R | The system should have the ability to query and filter the Esri geodatabase from within the EAMS* software | | | | | | | | |
| 70 | R | System should provide a map interface, allowing the user to view assets, search, pan, zoom, locate, measure distances and include the capability to view information about assets' attributes from the GIS. | | | | | | | | |
| 71 | R | Map should be comprised of ArcGIS Server Map Services hosted on the City's ArcGIS Server or Esri ArcGIS Online Services, or a combination of both. | | | | | | | | |
| 72 | R | Must support multiple map services, specific to users or groups of users, to meet the various GIS needs of each work business unit. | | | | | | | | |
| 73 | R | Ability to locate address utilizing ArcGIS locating services (geocoding service). | | | | | | | | |
| 74 | R | Ability to select assets in the GIS map and create work orders and inspections associated to the selected assets. | | | | | | | | |
| 75 | R | Ability to attach multiple assets to a work order. | | | | | | | | |
| 76 | I | All work activities, (requests, work orders, inspections, etc.) should be displayed live on the map interface based on user preferences. User should be able to open activities from the map. | | | | | | | | |
| 77 | R | Ability to update asset attributes from within the EAMS software. All updates should utilize | | | | | | | | |

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| | | Esri technology so as to maintain the integrity of the GIS system. | | | | | | | |
| 78 | R | Ability to easily publish work activities within the AMS software to REST endpoints for consumption on ArcGIS Server or ArcGIS Online. | | | | | | | |
| 79 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets in a specific neighborhood." | | | | | | | |
| 80 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets in a user defined area." | | | | | | | |
| 81 | I | Display on a map the location and status of selected work order(s); examples of selection sets: all work orders for today, since a certain date, of a certain type or types, etc. | | | | | | | |
| 82 | R | Create and close a work order from a selected map feature(s) and a service request from a location(s). | | | | | | | |
| 83 | R | Display user-configurable map views; i.e., the ability to have different map layers visible based on preference, display scale, and/or work role. | | | | | | | |
| 84 | R | Map viewer should provide tools to users for performing basic geographic-related tasks: for example, calculating measurements for length, and area, and determining relationships | | | | | | | |

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| | | between assets, work orders, service requests to other GIS features like address points using buffer, intersection, and tracing tools. | | | | | | | |
| 85 | I | Print and/or export (for example, PDF format) a map with a legend, bar scale, and notes displaying work order or asset location. | | | | | | | |
| 86 | I | Describe dispatch and routing capabilities for the EAM using maps so crews can be directed to assigned service requests/work orders as efficiently as possible. Captured in 89 | | | | | | | |
| 87 | R | Create location-based reports (geo-reports) of assets or work orders based on geographic region or user defined areas and subjects. For example: how many work orders were completed last year in a specific District, neighborhood or groups of neighborhoods? Or how many flooding service calls were reported in a user-defined area? | | | | | | | |
| | R | Asset Record Tracking, Inspection and Condition Analysis | | | | | | | |
| 88 | R | Asset master record that supports, including but not limited to any of the following attributes: category, sub-category, asset number, related numbers (e.g. serial number, Proposer number, etc.), parent/child relationships, acquisition date, install date, disposal date, expected useful life, location, department, person asset is assigned to, GPS coordinates, unit of measure (lineal feet, cu. Meter), AP Voucher #, PO #, Proposer, | | | | | | | |

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| | | warranty information, disposal cost, salvage value, as-built diagram, photo, related nested assets and various attachments. | | | | | | | |
| 89 | R | Briefly describe your best practices for the asset creation process (e.g. create asset and numbers in GIS, then push to EAM; or create asset and numbers in EAM, then push to GIS; or both; or without push). Do they vary by asset type? Presentation Question then delete | | | | | | | |
| 90 | R | Ability to capture inventory of roadway and Storm Water system features that are not traditionally considered “assets,” such as pavement surface, shoulders, ditches, back slopes, and enclosed conveyance systems. All system functionality associated with traditional assets must apply to these inventory features. | | | | | | | |
| 91 | R | Capture several dates on asset master record (e.g. original date put into service, refurbished, warranty work completed, etc.). | | | | | | | |
| 92 | I | Capture dimensional attributes of an asset and its components (e.g. shape of an underground vault, location of components). | | | | | | | |
| 93 | R | Ability to add and adjust asset information with permissions – warranty, expected life of asset, etc. | | | | | | | |
| 94 | I | Field ability to pull up as-built diagrams, image files, multimedia files etc. | | | | | | | |
| 95 | R | Easily transfer an asset and all related records and history to another location or facility, tied | | | | | | | |

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| | | to GIS. | | | |
| 96 | R | Ability to group assets within a category and area in GIS format to help schedule and coordinate preventive maintenance activities. | | | |
| 97 | I | Ability to track asset and infrastructure maintenance within a user definable geographic boundary. | | | |
| 98 | R | Track asset activities and history for unlimited years (e.g. repairs, replacement, refurbishment, maintenance, upgrades, retirement, abandon-in-place, disposal cost, etc.). | | | |
| 99 | I | Ability to collect and store condition assessment data against an asset e.g. number of leaks, number of repairs, defects, thickness measurements, anode deterioration, safety issues, etc. | | | |
| 100 | R | Captures and stores for assets the results of various inspections such as the City's NDPES SWOPS, flow monitoring, I/I investigations, smoke testing, hydrant flow testing, back-flow preventions device testing, pump efficiency testing, etc. | | | |
| 101 | R | Inspections must provide flexibility for user defined fields and forms. | | | |
| 102 | R | Ability to define custom inspection observations with weighted scoring by asset type. Weighted scoring should result in a condition score on the asset. Scoring weights | | | |

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| | | should be defined by city. | | | |
| 103 | R | Ability to conduct a condition analysis from within the map interface, combining inspection data and GIS attributes which results in the selection of assets based on condition score range. | | | |
| 104 | R | Ability to summarize asset condition by heat maps. | | | |
| 105 | R | Must have the ability to perform asset condition modeling, depreciation and valuation completely without reliance on outside software. | | | |
| 106 | I | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets inspected on a certain date in a specific neighborhood." | | | |
| 107 | I | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all assets inspected on a certain date in a user defined area." | | | |
| 108 | R | Condition tracking with actual useful life, customer-defined conditions, replacement cost and time analysis independent of financial depreciation. | | | |
| 109 | R | Ability to track and manage compliance reporting, develop risk profiles, status of agreements, permits, etc. pertaining to the condition of assets. | | | |

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| 110 | I | Provide configurable alerts based on asset conditions and level of service. | | | | | | | |
| 111 | R | Field ability to remotely pull up the complete history of an asset. Field ability to update or add an asset. | | | | | | | |
| 112 | I | Ability to track assets within a building. E.g. Conference Rooms, restrooms, card readers. | | | | | | | |
| | R | Asset Lifecycle Management | | | | | | | |
| 113 | R | Briefly discuss your asset lifecycle management functionality. E.g. asset productivity, analyze lifecycle and lifecycle costs of asset, types of assets, risk assessment and risk management and categories of assets in compliance with utility asset management standards. Discuss your experience. | | | | | | | |
| 114 | R | Briefly discuss how you comply with utility asset management standards for properly handling assets for water, wastewater and storm water utilities. E.g. tracking assets, asset classifications, cost categories, asset life, and risk assessment. | | | | | | | |
| 115 | I | Put in an asset #, address, cross street or other attribute and see planned projects impacting that asset (e.g. for linear/horizontal asset, see other utility maintenance work projects, overlays, CIP). | | | | | | | |
| 116 | I | Predictive analysis for asset useful life and lifecycle maintenance. | | | | | | | |

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| 117 | I | Manage and track all construction and maintenance costs for non-City assets for which ownership is later transferred to the City. E.g. a developer owns and pays for the construction of his own water and sewer system (the City could be in charge of doing the construction for the developer). After two years and passing City warranty and compliance requirements, ownership is then transferred to the City. Transfer could be at no cost, but asset value and ongoing asset maintenance costs need to be tracked. | | | | | | | |
| 118 | I | Plant equipment depreciation tied to utility asset lifecycle calculations (predictions of useful life based on historical data). This is different from accounting depreciation. | | | | | | | |
| 119 | N | Side-by-side visual comparisons of an asset from one inspection vs. another. E.g. visual comparison of a segment of pipe inspected and photographed in 2011 vs. inspected and photographed in 2007. | | | | | | | |
| | R | Parts/Supplies Inventory | | | | | | | |
| 120 | I | Support multi-location inventory warehouses for supplies, parts, and equipment/assets where the same item number may be in inventory in multiple locations. | | | | | | | |
| 121 | I | Easily transfer supplies, parts, etc. from one warehouse location to another. Update records and credit/charge impact for each department involved. | | | | | | MD follow up | |

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| 122 | R | Ability to assign asset to one or more business units and be able to transfer between units. | | | | | | | |
| 123 | R | Ability to create categories, assign assets, re-categorizes assets. | | | | | | | |
| 124 | R | Experience interfacing with financial systems for purchasing, matching and valuation. | | | | | | | |
| 125 | R | Ability to individually create or archive assets. | | | | | | | |
| 126 | I | Min/max order quantities and re-order lead times that trigger suggested purchase requisitions. | | | | | | | |
| 127 | I | Ability to value parts individually or in groups (e.g. single valve cover, all valve covers). | | | | | | | |
| 128 | I | Support bar code reading for additions and depletions to inventory. Or do you have a barcoding system apart of the system? Explain if you have partnerships with hardware providers. | | | | | | | |
| 129 | I | Easily return materials to inventory that were not used on a work order or service call. | | | | | | | |
| 130 | I | A-B-C cycle counting tools/scheduling for parts, supplies, and equipment/assets inventories. | | | | | | | |
| | R | Preventive Maintenance (PM)/Scheduling | | | | | | | |
| 131 | R | Define Preventive Maintenance Tasks to include default information: area, category, sub- | | | | | | | |

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| | | category, tasks, procedures, hours, materials, equipment, skill set, staff assignment, etc. | | | |
| 132 | R | Maintenance triggers and schedule based on customer defined parameters such as warranty expiration, usage hours, flow volumes, asset age, environmental conditions, average expected life, time milestones (e.g. every 5 years), etc. | | | |
| 133 | R | Ability to schedule equipment preventive maintenance and track and report on results. | | | |
| 134 | I | Create and maintain a calendar and schedule for staff, activities, maintenance, and offer workload management features. | | | |
| 135 | R | Auto-generate work orders with default information from predefined Preventive Maintenance tasks. | | | |
| 136 | R | Create a single preventive maintenance work order for like horizontal assets. | | | |
| 137 | R | Handle preventive maintenance management and asset management for vertical assets (e.g. a building and its components). | | | |
| 138 | R | Handle preventive maintenance management and asset management for linear assets. E.g. pipes, pumps, meters, etc. that comprise a whole main system, enclosed drainage systems, shoulders, ditches, back slopes, and paved roadway surfaces. | | | |

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| 139 | I | Performance-based asset maintenance. E.g. tied to incident reports and SCADA detail. | | | | | | | |
| 140 | R | Report on condition of assets (customer defines conditions; different conditions for different assets). E.g. Condition of chambers, pipe nodes, etc.) | | | | | | | |
| 141 | R | Provide ability to schedule inspection and condition monitoring of assets and inventory and create work orders and task level workload and budget forecasts for all maintenance activities. | | | | | | | |
| 142 | R | Customer defined inspection templates (e.g. test results, photos, checklist of inspections activities, etc.) | | | | | | | |
| | R | Work Management | | | | | | | |
| 143 | R | Unlimited Work Order attributes such as Department, Division, group, category, sub-category, SLA by category, status, location, Project #, Service Order #, description, incident reported time and date, completion time and date, assigned staff, labor hours and cost by technician, material quantities and cost, cause code, solution, test results, user defined fields, etc. | | | | | | | |
| 144 | R | Assign resources to work orders” to see how many people and what materials and equipment are needed (generally) to perform standard tasks. | | | | | | | |

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| 145 | | Ability for resource allocation so that work orders are tied to available staff, materials and equipment. I.e. a person can't be assigned work orders exceeding their shift hours, work orders cannot be assigned to equipment that is out for maintenance, or for materials that are out of stock, without appropriate warnings and overrides. | | | | | | | |
| 146 | | Ability to provide Dynamic Master Planning - Integrated and continuous updating and planning for water, sewer, and stormwater systems | | | | | | | |
| 147 | R | Create and assign priority and status criteria for work orders via defined service levels. | | | | | | | |
| 148 | R | Ability to define unlimited work order activity types for any asset type defined in GIS. | | | | | | | |
| 149 | R | Ability to generate work orders from service requests, creating relationships between work orders, and attaching work orders to any number of assets or to locations without assets. | | | | | | | |
| 150 | R | The work order system should track parts, labor, equipment, and other costs/resources associated with the work activity. | | | | | | | |
| 151 | R | Costs should be associated to assets on the work order and asset costs should be easily reportable from with the system. | | | | | | | |
| 152 | R | Should support capability to dispatch work orders to work crews. Work crews should be able to access and prioritize work orders by | | | | | | | |

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| | | multiple attributes. | | | |
| 153 | R | Ability to create work requests from inside the map interface. Ability to view all work activities on a map and label by priority, status, type, etc. | | | |
| 154 | R | Track relationship between service request and work order. | | | |
| 155 | R | Ability for personnel to select and review work requests and work orders using multiple selection and sorting criteria that include all work request, work order fields, and any geographic area available in the enterprise geodatabase. | | | |
| 156 | R | Ability to view all work activities on a map and label by priority, status, type, etc. | | | |
| 157 | I | Ability to attach multimedia files to work order. | | | |
| 158 | I | Ability to organize work orders and associated costs to project with a budget. | | | |
| 159 | I | Ability to modify (hide, relocate, repurpose, etc.) all fields on end user forms/screens. | | | |
| 160 | I | Ability to establish required fields so as to ensure data input integrity. | | | |
| 161 | N | Ability to assign maintenance scores to work activity types. | | | |

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| 162 | R | Must be able to update GIS attributes with fields from the work management system automatically (no manual or scheduled push to GIS). | | | | | | | | |
| 163 | I | Must be able to report on total cost of maintenance for one or many selected assets. | | | | | | | | |
| 164 | N | Ability to view work activities on a calendar. | | | | | | | | |
| 165 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display work on a certain date in a specific neighborhood." | | | | | | | | |
| 166 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display work on a certain date in a user defined area." | | | | | | | | |
| 167 | I | Provide escalation process and approvals for emergency and priority requests. | | | | | | | | |
| 168 | R | Notify user upon work order creation that a similar work order for the same asset already exists. | | | | | | | | |
| 169 | R | Allow assets without fixed locations to be added to work orders (e.g. right of way mowing). | | | | | | | | |
| 170 | R | Allow work orders to be created and closed without assets tied to them. | | | | | | | | |
| 171 | R | Ability to modify work order type. | | | | | | | | |

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| 172 | R | Track materials issued to a work order; interface to Inventory module for automated adjustments to inventory levels. | | | | | | | | |
| 173 | R | Generate a Work Order that includes maintenance on multiple assets. | | | | | | | | |
| 174 | R | Generate a single Work Order that includes multiple tasks or activities. | | | | | | | | |
| 175 | R | Groups associated or nested assets and create a single work order for that group. For example a storm water detention system could consist of multiple assets of different types, so the EAM should allow users to create a work order against the detention system that includes all its associated assets. | | | | | | | | |
| 176 | I | Connect follow-up or subordinate work orders to a primary or original work order. | | | | | | | | |
| 177 | I | Ability to group work orders into a “project.” | | | | | | | | |
| 178 | R | Ability to categorize and enter into system work orders that represent work done for a calamitous (FEMA) event. | | | | | | | | |
| 179 | I | Ability to assign status to work order as a whole, or to individual tasks or activities within it, update that assignment and check on progress. | | | | | | | | |
| 180 | R | Automatically generate recurring work order based on schedule defined by user, WO or asset type. Allow override of default | | | | | | | | |

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| | | parameters. | | | |
| 181 | R | Ability to schedule and assign preventative or routine work orders for future and planned maintenance. | | | |
| 182 | R | Ability to create standard pick lists of employees, materials, equipment for assignment to work orders. | | | |
| 183 | R | Ability to generate a daily work list for staff based on work orders and assigned tasked and estimated time to complete them. | | | |
| 184 | R | Ability for leads to view activities and status of each crew. | | | |
| 185 | I | Ability to schedule closures; shut downs by date, or by date and time. | | | |
| 186 | I | Notification to field crews that an update to a work order has been made. | | | |
| 187 | R | Provide costs and percent complete of delineated program; i.e. measuring progress on street sweeping. | | | |
| 188 | E | Capture time entry direct from field staff or via integration to Kronos. Please describe your functionality. The goal would be one point of entry for time capture and leave requests that then automatically feed Payroll and HR, project accounting, and work order activity reporting. | | | |
| 189 | R | Capture multiple lines of time entry per work order spanning dates and different employees | | | |

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| | | and Proposers. | | | |
| 190 | I | Ability to account for non-productive time or time not associated with an asset so that all personnel time is captured for timekeeping interface and labor distribution reports. | | | |
| 191 | I | Ability to collapse the project time tracking detail into categories for payroll purposes: E.g. .5 hours on water main, .5 hours on drain pipe collapses to 1.0 hours regular time for payroll purposes. | | | |
| 192 | I | Discuss how your application synchronizes after temporarily losing cell data connectivity (e.g. the work is done in the basement with no data coverage). | | | |
| | R | Request Management & Call Center | | | |
| 193 | R | The EAMS software should provide functionality for logging, mapping, and tracking calls for service. | | | |
| 194 | R | Ability to define service request types and user defined caller questions, instructions and comments. | | | |
| 195 | R | Ability to log calls from internal and external customers. | | | |
| 196 | R | Ability to turn caller information recorded on a Call Center Work Request into Work Orders. | | | |
| 197 | R | Ability to select calling customer's address and/or name from list generated from billing application. | | | |

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| 198 | R | Ability to record information regarding caller if different from property owner. | | | | | | | | |
| 199 | R | Uses ESRI Geocoding services for address locator, including cross streets. | | | | | | | | |
| 200 | R | Ability to route request to city staff by geographic layer as defined in the GIS. | | | | | | | | |
| 201 | R | Ability to track multiple callers per request. | | | | | | | | |
| 202 | R | System should prompt call taker if there is an open request of the same type in the same general area so as to reduce duplicate effort. | | | | | | | | |
| 203 | R | Link multiple Service Orders (generated from citizen requests/complaints) to a single Work Order. | | | | | | | | |
| 204 | R | The system must directly interface with Outlook email program so that a work request is easily replicated into an email to send outside the software. | | | | | | | | |
| 205 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all requests in a specific neighborhood." | | | | | | | | |
| 206 | R | Ability to use all geographic area map services available to perform geospatial queries such as "select and map display all requests in a user defined area." | | | | | | | | |
| 207 | I | Provide a web-based portal for the public (external customers) to create and submit requests for service. | | | | | | | | |

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| 208 | R | Provide a web-based portal for City employees (internal customers) to create and submit requests for service. | | | | | | | |
| 209 | R | Alerts for multiple service requests for the same asset/feature. | | | | | | | |
| 210 | R | Assign priorities for service requests based on service type, service level, and supporting authorized user overrides.1 | | | | | | | |
| 211 | R | Track service requests or work orders by date, geographic area, asset, type, priority, assignment and duration. | | | | | | | |
| 212 | R | Track all service request costs, both reactive and emergency work. Ability to breakout a priority level for emergency service requests. | | | | | | | |
| 213 | | Ability to automatically e-mail customer the status of a Customer Service Request as it is processed. | | | | | | | |
| | R | Billing | | | | | | | |
| 214 | R | Generate report to identify Work Orders that have been flagged as billable. | | | | | | | |
| 215 | R | Integration with ERP Accounts Receivable for invoice creation and distribution. | | | | | | | |
| 216 | R | Support asset planning and budgeting process (e.g. FTE staff level planning to support desired service levels, costs to perform maintenance tasks, etc.). | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. Proposer Response Legend: Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|-----|---|---|---|--|--|--|--|--|---|-----------------------------|
| 217 | I | Ability from one Work Order to allocate labor and material costs to separate departments for shared projects, cross-billing, chargebacks and facilities. | | | | | | | | |
| | R | Reporting | | | | | | | | |
| 218 | R | Indicate reporting tools offered. If 3 rd party, list Proposer. Discuss integration to core suite and strategy to stay current with version releases. | | | | | | | | |
| 219 | R | Describe data output formats (e.g. XML, Excel, CSV, etc.) | | | | | | | | |
| 220 | R | Search and report on all fields in database, including user-defined fields, with ability to organize, summarize, sort, and sub-total in a variety of ways. | | | | | | | | |
| 221 | I | Intuitive ad hoc query and reporting for users with wild card search and drop down lists. Search, sort, set report parameters (e.g. date ranges). Allows easy access to the data for report and query generation without the need for a programming specialist. | | | | | | | | |
| 222 | R | Reporting by date range and combinations of other parameters. | | | | | | | | |
| 223 | I | Customer-defined exception reporting. | | | | | | | | |
| 224 | R | Save a query as a report on desktop or to a library in the system for re-use in future. | | | | | | | | |
| 225 | I | Modify report templates or standard reports and save new format for use in the future. | | | | | | | | |

| | | Key Functional Criteria R = Required I = Important N = Nice to Have E = Explore | Proposer Response Y 3P C F N | | | | | | Comments *if Proposer responds with 3P, C, or F, additional information must be provided as noted on Instructions page. <u>Proposer Response Legend:</u> Y = Fully supported by current software release 3P = Third Party Software C = Customization F = Future Functionality N = Not Supported | Applicable Module(s) |
|-----|---|--|---|--|--|--|--|--|--|-----------------------------|
| 226 | I | Access reports through graphical dashboard display. | | | | | | | | |
| 227 | I | Executive Dashboard tailored to each user. Describe. | | | | | | | | |
| 228 | N | Ability to integrate EAM dashboard parts into an Enterprise dashboard | | | | | | | | |
| 229 | I | Ability to generate -, track and report on key performance indicators, accomplishments, variances, failures and issues. | | | | | | | | |
| 230 | I | Built-in graph and charting capabilities. | | | | | | | | |
| 231 | N | Drill down from report line item to detail transaction level. | | | | | | | | |
| 232 | N | Search on comments fields. | | | | | | | | |
| 233 | I | Ability to report staff time across at least two dimensions: the activity performed and the project the activity was completed on. | | | | | | | | |

NON-COLLUSION STATEMENT:

By signing this offer, the vendor/contractor certifies that this offer is made independently and *free* from collusion. Vendor shall disclose below any City of Fort Lauderdale, FL officer or employee, or any relative of any such officer or employee who is an officer or director of, or has a material interest in, the vendor's business, who is in a position to influence this procurement.

Any City of Fort Lauderdale, FL officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement.

For purposes hereof, a person has a material interest if they directly or indirectly own more than 5 percent of the total assets or capital stock of any business entity, or if they otherwise stand to personally gain if the contract is awarded to this vendor.

In accordance with City of Fort Lauderdale, FL Policy and Standards Manual, 6.10.8.3,

3.3. City employees may not contract with the City through any corporation or business entity in which they or their immediate family members hold a controlling financial interest (e.g. ownership of five (5) percent or more).

3.4. Immediate family members (spouse, parents and children) are also prohibited from contracting with the City subject to the same general rules.

Failure of a vendor to disclose any relationship described herein shall be reason for debarment in accordance with the provisions of the City Procurement Code.

NAME**RELATIONSHIPS**

-

In the event the vendor does not indicate any names, the City shall interpret this to mean that the vendor has indicated that no such relationships exist.

CONTRACT PAYMENT METHOD BY P-CARD

THIS FORM MUST BY SUBMITTED WITH YOUR RESPONSE

The City of Fort Lauderdale has implemented a Procurement Card (P-Card) program which changes how payments are remitted to its vendors. The City has transitioned from traditional paper checks to payment by credit card via MasterCard or Visa. This allows you as a vendor of the City of Fort Lauderdale to receive your payment fast and safely. No more waiting for checks to be printed and mailed.

Payments will be made utilizing the City's P-Card (MasterCard or Visa). Accordingly, firms must presently have the ability to accept credit card payment or take whatever steps necessary to implement acceptance of a credit card before the commencement of a contract.

Please indicate which credit card payment you prefer:

☐ Master Card

☐ Visa Card

Company Name:

Name (Printed)

Signature

Date:

Title

BID/PROPOSAL CERTIFICATION

Please Note: If responding to this solicitation through BidSync, the electronic version of the bid response will prevail, unless a paper version is clearly marked **by the bidder** in some manner to indicate that it will supplant the electronic version. All fields below must be completed. If the field does not apply to you, please note N/A in that field.

If you are a foreign corporation, you may be required to obtain a certificate of authority from the department of state,
in accordance with Florida Statute §607.1501 (visit <http://www.dos.state.fl.us/>).

Company: (Legal Registration)

Address:

City: State: Zip:

Telephone No. FAX No. Email:

Delivery: Calendar days after receipt of Purchase Order (**section 1.02 of General Conditions**):

Total Bid Discount (**section 1.05 of General Conditions**):

Does your firm qualify for MBE or WBE status (**section 1.09 of General Conditions**): MBE ☐ WBE ☐

ADDENDUM ACKNOWLEDGEMENT - Proposer acknowledges that the following addenda have been received and are included in the proposal:

| <u>Addendum No.</u> | <u>Date Issued</u> | <u>Addendum No.</u> | <u>Date Issued</u> | <u>Addendum No.</u> | <u>Date Issued</u> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
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| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

VARIANCES: If you take exception or have variances to any term, condition, specification, scope of service, or requirement in this competitive solicitation you must specify such exception or variance in the space provided below or reference in the space provided below all variances contained on other pages within your response. Additional pages may be attached if necessary. No exceptions or variances will be deemed to be part of the response submitted unless such is listed and contained in the space provided below. The City does not, by virtue of submitting a variance, necessarily accept any variances. If no statement is contained in the below space, it is hereby implied that your response is in full compliance with this competitive solicitation. If you do not have variances, simply mark N/A. **If submitting your response electronically through BIDSINC you must also click the "Take Exception" button.**

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The below signatory hereby agrees to furnish the following article(s) or services at the price(s) and terms stated subject to all instructions, conditions, specifications addenda, legal advertisement, and conditions contained in the bid/proposal. I have read all attachments including the specifications and fully understand what is required. By submitting this signed proposal I will accept a contract if approved by the City and such acceptance covers all terms, conditions, and specifications of this bid/proposal. The below signatory also hereby agrees, by virtue of submitting or attempting to submit a response, that in no event shall the City's liability for respondent's direct, indirect, incidental, consequential, special or exemplary damages, expenses, or lost profits arising out of this competitive solicitation process, including but not limited to public advertisement, bid conferences, site visits, evaluations, oral presentations, or award proceedings exceed the amount of Five Hundred Dollars (\$500.00). This limitation shall not apply to claims arising under any provision of indemnification or the City's protest ordinance contained in this competitive solicitation.

Submitted by:

Name (printed)

Signature

Date:

Title

**CITY OF FORT LAUDERDALE
GENERAL CONDITIONS**

These instructions are standard for all contracts for commodities or services issued through the City of Fort Lauderdale Procurement Services Division. The City may delete, supersede, or modify any of these standard instructions for a particular contract by indicating such change in the Invitation to Bid (ITB) Special Conditions, Technical Specifications, Instructions, Proposal Pages, Addenda, and Legal Advertisement. In this general conditions document, Invitation to Bid (ITB), Request for Qualifications (RFQ), and Request for Proposal (RFP) are interchangeable.

PART I BIDDER PROPOSAL PAGE(S) CONDITIONS:

- 1.01 BIDDER ADDRESS:** The City maintains automated vendor address lists that have been generated for each specific Commodity Class item through our bid issuing service, BidSync. Notices of Invitations to Bid (ITB'S) are sent by e-mail to the selection of bidders who have fully registered with BidSync or faxed (if applicable) to every vendor on those lists, who may then view the bid documents online. Bidders who have been informed of a bid's availability in any other manner are responsible for registering with BidSync in order to view the bid documents. There is no fee for doing so. If you wish bid notifications be provided to another e-mail address or fax, please contact BidSync. If you wish purchase orders sent to a different address, please so indicate in your bid response. If you wish payments sent to a different address, please so indicate on your invoice.
- 1.02 DELIVERY:** Time will be of the essence for any orders placed as a result of this ITB. The City reserves the right to cancel any orders, or part thereof, without obligation if delivery is not made in accordance with the schedule specified by the Bidder and accepted by the City.
- 1.03 PACKING SLIPS:** It will be the responsibility of the awarded Contractor, to attach all packing slips to the OUTSIDE of each shipment. Packing slips must provide a detailed description of what is to be received and reference the City of Fort Lauderdale purchase order number that is associated with the shipment. Failure to provide a detailed packing slip attached to the outside of shipment may result in refusal of shipment at Contractor's expense.
- 1.04 PAYMENT TERMS AND CASH DISCOUNTS:** Payment terms, unless otherwise stated in this ITB, will be considered to be net 45 days after the date of satisfactory delivery at the place of acceptance and receipt of correct invoice at the office specified, whichever occurs last. Bidder may offer cash discounts for prompt payment but they will not be considered in determination of award. If a Bidder offers a discount, it is understood that the discount time will be computed from the date of satisfactory delivery, at the place of acceptance, and receipt of correct invoice, at the office specified, whichever occurs last.
- 1.05 TOTAL BID DISCOUNT:** If Bidder offers a discount for award of all items listed in the bid, such discount shall be deducted from the total of the firm net unit prices bid and shall be considered in tabulation and award of bid.
- 1.06 BIDS FIRM FOR ACCEPTANCE:** Bidder warrants, by virtue of bidding, that the bid and the prices quoted in the bid will be firm for acceptance by the City for a period of one hundred twenty (120) days from the date of bid opening unless otherwise stated in the ITB.
- 1.07 VARIANCES:** For purposes of bid evaluation, Bidder's must indicate any variances, no matter how slight, from ITB General Conditions, Special Conditions, Specifications or Addenda in the space provided in the ITB. No variations or exceptions by a Bidder will be considered or deemed a part of the bid submitted unless such variances or exceptions are listed in the bid and referenced in the space provided on the bidder proposal pages. If variances are not stated, or referenced as required, it will be assumed that the product or service fully complies with the City's terms, conditions, and specifications.
- By receiving a bid, City does not necessarily accept any variances contained in the bid. All variances submitted are subject to review and approval by the City. If any bid contains material variances that, in the City's sole opinion, make that bid conditional in nature, the City reserves the right to reject the bid or part of the bid that is declared, by the City as conditional.
- 1.08 NO BIDS:** If you do not intend to bid please indicate the reason, such as insufficient time to respond, do not offer product or service, unable to meet specifications, schedule would not permit, or any other reason, in the space provided in this ITB. Failure to bid or return no bid comments prior to the bid due and opening date and time, indicated in this ITB, may result in your firm being deleted from our Bidder's registration list for the Commodity Class Item requested in this ITB.
- 1.09 MINORITY AND WOMEN BUSINESS ENTERPRISE PARTICIPATION AND BUSINESS DEFINITIONS:** The City of Fort Lauderdale wants to increase the participation of Minority Business Enterprises (MBE), Women Business Enterprises (WBE), and Small Business Enterprises (SBE) in its procurement activities. If your firm qualifies in accordance with the below definitions please indicate in the space provided in this ITB.

Minority Business Enterprise (MBE) "A Minority Business" is a business enterprise that is owned or controlled by one or more socially or economically disadvantaged persons. Such disadvantage may arise from cultural, racial, chronic economic

circumstances or background or other similar cause. Such persons include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

The term "Minority Business Enterprise" means a business at least 51 percent of which is owned by minority group members or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by minority group members. For the purpose of the preceding sentence, minority group members are citizens of the United States who include, but are not limited to: Blacks, Hispanics, Asian Americans, and Native Americans.

Women Business Enterprise (WBE) a "Women Owned or Controlled Business" is a business enterprise at least 51 percent of which is owned by females or, in the case of a publicly owned business, at least 51 percent of the stock of which is owned by females.

Small Business Enterprise (SBE) "Small Business" means a corporation, partnership, sole proprietorship, or other legal entity formed for the purpose of making a profit, which is independently owned and operated, has either fewer than 100 employees or less than \$1,000,000 in annual gross receipts.

BLACK, which includes persons having origins in any of the Black racial groups of Africa.

WHITE, which includes persons whose origins are Anglo-Saxon and Europeans and persons of Indo-European decent including Pakistani and East Indian.

HISPANIC, which includes persons of Mexican, Puerto Rican, Cuban, Central and South American, or other Spanish culture or origin, regardless of race.

NATIVE AMERICAN, which includes persons whose origins are American Indians, Eskimos, Aleuts, or Native Hawaiians.

ASIAN AMERICAN, which includes persons having origin in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands.

1.10 MINORITY-WOMEN BUSINESS ENTERPRISE PARTICIPATION

It is the desire of the City of Fort Lauderdale to increase the participation of minority (MBE) and women-owned (WBE) businesses in its contracting and procurement programs. While the City does not have any preference or set aside programs in place, it is committed to a policy of equitable participation for these firms. Proposers are requested to include in their proposals a narrative describing their past accomplishments and intended actions in this area. If proposers are considering minority or women owned enterprise participation in their proposal, those firms, and their specific duties have to be identified in the proposal. If a proposer is considered for award, he or she will be asked to meet with City staff so that the intended MBE/WBE participation can be formalized and included in the subsequent contract.

1.11 SCRUTINIZED COMPANIES

Subject to *Odebrecht Construction, Inc., v. Prasad*, 876 F.Supp.2d 1305 (S.D. Fla. 2012), *affirmed*, *Odebrecht Construction, Inc., v. Secretary, Florida Department of Transportation*, 715 F.3d 1268 (11th Cir. 2013), with regard to the "Cuba Amendment," the Contractor certifies that it is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2016), that it is not engaged in a boycott of Israel, and that it does not have business operations in Cuba or Syria, as provided in section 287.135, Florida Statutes (2016), as may be amended or revised. The City may terminate this Agreement at the City's option if the Contractor is found to have submitted a false certification as provided under subsection (5) of section 287.135, Florida Statutes (2016), as may be amended or revised, or been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or the Scrutinized Companies that Boycott Israel List created pursuant to Section 215.4725, Florida Statutes (2016), or is engaged in a boycott of Israel or has been engaged in business operations in Cuba or Syria, as defined in Section 287.135, Florida Statutes (2016), as may be amended or revised.

1.12 DEBARRED OR SUSPENDED BIDDERS OR PROPOSERS

The bidder or proposer certifies, by submission of a response to this solicitation, that neither it nor its principals and subcontractors are presently debarred or suspended by any Federal department or agency.

Part II DEFINITIONS/ORDER OF PRECEDENCE:

- 2.01 BIDDING DEFINITIONS** The City will use the following definitions in its general conditions, special conditions, technical specifications, instructions to bidders, addenda and any other document used in the bidding process:
INVITATION TO BID (ITB) when the City is requesting bids from qualified Bidders.

REQUEST FOR PROPOSALS (RFP) when the City is requesting proposals from qualified Proposers.

REQUEST FOR QUALIFICATIONS (RFQ) when the City is requesting qualifications from qualified Proposers.

BID – a price and terms quote received in response to an ITB.

PROPOSAL – a proposal received in response to an RFP.

BIDDER – Person or firm submitting a Bid.

PROPOSER – Person or firm submitting a Proposal.

RESPONSIVE BIDDER – A person whose bid conforms in all material respects to the terms and conditions included in the ITB.

RESPONSIBLE BIDDER – A person who has the capability in all respects to perform in full the contract requirements, as stated in the ITB, and the integrity and reliability that will assure good faith performance.

FIRST RANKED PROPOSER – That Proposer, responding to a City RFP, whose Proposal is deemed by the City, the most advantageous to the City after applying the evaluation criteria contained in the RFP.

SELLER – Successful Bidder or Proposer who is awarded a Purchase Order or Contract to provide goods or services to the City.

CONTRACTOR – Successful Bidder or Proposer who is awarded a Purchase Order, award Contract, Blanket Purchase Order agreement, or Term Contract to provide goods or services to the City.

CONTRACT – A deliberate verbal or written agreement between two or more competent parties to perform or not to perform a certain act or acts, including all types of agreements, regardless of what they may be called, for the procurement or disposal of equipment, materials, supplies, services or construction.

CONSULTANT – Successful Bidder or Proposer who is awarded a contract to provide professional services to the City.

The following terms may be used interchangeably by the City: ITB and/or RFP; Bid or Proposal; Bidder, Proposer, or Seller; Contractor or Consultant; Contract, Award, Agreement or Purchase Order.

- 2.02 SPECIAL CONDITIONS:** Any and all Special Conditions contained in this ITB that may be in variance or conflict with these General Conditions shall have precedence over these General Conditions. If no changes or deletions to General Conditions are made in the Special Conditions, then the General Conditions shall prevail in their entirety,

PART III BIDDING AND AWARD PROCEDURES:

- 3.01 SUBMISSION AND RECEIPT OF BIDS:** To receive consideration, bids must be received prior to the bid opening date and time. Unless otherwise specified, Bidders should use the proposal forms provided by the City. These forms may be duplicated, but failure to use the forms may cause the bid to be rejected. Any erasures or corrections on the bid must be made in ink and initialed by Bidder in ink. All information submitted by the Bidder shall be printed, typewritten or filled in with pen and ink. Bids shall be signed in ink. Separate bids must be submitted for each ITB issued by the City in separate sealed envelopes properly marked. When a particular ITB or RFP requires multiple copies of bids or proposals they may be included in a single envelope or package properly sealed and identified. Only send bids via facsimile transmission (FAX) if the ITB specifically states that bids sent via FAX will be considered. If such a statement is not included in the ITB, bids sent via FAX will be rejected. Bids will be publicly opened in the Procurement Office, or other designated area, in the presence of Bidders, the public, and City staff. Bidders and the public are invited and encouraged to attend bid openings. Bids will be tabulated and made available for review by Bidder's and the public in accordance with applicable regulations.
- 3.02 MODEL NUMBER CORRECTIONS:** If the model number for the make specified in this ITB is incorrect, or no longer available and replaced with an updated model with new specifications, the Bidder shall enter the correct model number on the bidder proposal page. In the case of an updated model with new specifications, Bidder shall provide adequate information to allow the City to determine if the model bid meets the City's requirements.
- 3.03 PRICES QUOTED:** Deduct trade discounts, and quote firm net prices. Give both unit price and extended total. In the case of a discrepancy in computing the amount of the bid, the unit price quoted will govern. All prices quoted shall be F.O.B. destination, freight prepaid (Bidder pays and bears freight charges, Bidder owns goods in transit and files any claims), unless otherwise stated in Special Conditions. Each item must be bid separately. No attempt shall be made to tie any item or items contained in the ITB with any other business with the City.
- 3.04 TAXES:** The City of Fort Lauderdale is exempt from Federal Excise and Florida Sales taxes on direct purchase of tangible property. Exemption **number for EIN is 59-6000319, and State Sales tax exemption number is 85-8013875578C-1.**
- 3.05 WARRANTIES OF USAGE:** Any quantities listed in this ITB as estimated or projected are provided for tabulation and information purposes only. No warranty or guarantee of quantities is given or implied. It is understood that the Contractor will furnish the City's needs as they arise.
- 3.06 APPROVED EQUAL:** When the technical specifications call for a brand name, manufacturer, make, model, or vendor catalog number with acceptance of APPROVED EQUAL, it shall be for the purpose of establishing a level of quality and features desired and acceptable to the City. In such cases, the City will be receptive to any unit that would be considered by qualified City personnel as an approved equal. In that the specified make and model represent a level of quality and features desired by the City, the Bidder must state clearly in the bid any variance from those specifications. It is the Bidder's responsibility to provide adequate information, in the bid, to enable the City to ensure that the bid meets the required criteria. If adequate information is not submitted with the bid, it may be rejected. The City will be the sole judge in determining if the item bid qualifies as an approved equal.

- 3.07 MINIMUM AND MANDATORY TECHNICAL SPECIFICATIONS:** The technical specifications may include items that are considered minimum, mandatory, or required. If any Bidder is unable to meet or exceed these items, and feels that the technical specifications are overly restrictive, the bidder must notify the Procurement Services Division immediately. Such notification must be received by the Procurement Services Division prior to the deadline contained in the ITB, for questions of a material nature, or prior to five (5) days before bid due and open date, whichever occurs first. If no such notification is received prior to that deadline, the City will consider the technical specifications to be acceptable to all bidders.
- 3.08 MISTAKES:** Bidders are cautioned to examine all terms, conditions, specifications, drawings, exhibits, addenda, delivery instructions and special conditions pertaining to the ITB. Failure of the Bidder to examine all pertinent documents shall not entitle the bidder to any relief from the conditions imposed in the contract.
- 3.09 SAMPLES AND DEMONSTRATIONS:** Samples or inspection of product may be requested to determine suitability. Unless otherwise specified in Special Conditions, samples shall be requested after the date of bid opening, and if requested should be received by the City within seven (7) working days of request. Samples, when requested, must be furnished free of expense to the City and if not used in testing or destroyed, will upon request of the Bidder, be returned within thirty (30) days of bid award at Bidder's expense. When required, the City may request full demonstrations of units prior to award. When such demonstrations are requested, the Bidder shall respond promptly and arrange a demonstration at a convenient location. Failure to provide samples or demonstrations as specified by the City may result in rejection of a bid.
- 3.10 LIFE CYCLE COSTING:** If so specified in the ITB, the City may elect to evaluate equipment proposed on the basis of total cost of ownership. In using Life Cycle Costing, factors such as the following may be considered: estimated useful life, maintenance costs, cost of supplies, labor intensity, energy usage, environmental impact, and residual value. The City reserves the right to use those or other applicable criteria, in its sole opinion that will most accurately estimate total cost of use and ownership.
- 3.11 BIDDING ITEMS WITH RECYCLED CONTENT:** In addressing environmental concerns, the City of Fort Lauderdale encourages Bidders to submit bids or alternate bids containing items with recycled content. When submitting bids containing items with recycled content, Bidder shall provide documentation adequate for the City to verify the recycled content. The City prefers packaging consisting of materials that are degradable or able to be recycled. When specifically stated in the ITB, the City may give preference to bids containing items manufactured with recycled material or packaging that is able to be recycled.
- 3.12 USE OF OTHER GOVERNMENTAL CONTRACTS:** The City reserves the right to reject any part or all of any bids received and utilize other available governmental contracts, if such action is in its best interest.
- 3.13 QUALIFICATIONS/INSPECTION:** Bids will only be considered from firms normally engaged in providing the types of commodities/services specified herein. The City reserves the right to inspect the Bidder's facilities, equipment, personnel, and organization at any time, or to take any other action necessary to determine Bidder's ability to perform. The Procurement Director reserves the right to reject bids where evidence or evaluation is determined to indicate inability to perform.
- 3.14 BID SURETY:** If Special Conditions require a bid security, it shall be submitted in the amount stated. A bid security can be in the form of a bid bond or cashier's check. Bid security will be returned to the unsuccessful bidders as soon as practicable after opening of bids. Bid security will be returned to the successful bidder after acceptance of the performance bond, if required; acceptance of insurance coverage, if required; and full execution of contract documents, if required; or conditions as stated in Special Conditions.
- 3.15 PUBLIC RECORDS/TRADE SECRETS/COPYRIGHT:** The Proposer's response to the RFP is a public record pursuant to Florida law, which is subject to disclosure by the City under the State of Florida Public Records Law, Florida Statutes Chapter 119.07 ("Public Records Law"). The City shall permit public access to all documents, papers, letters or other material submitted in connection with this RFP and the Contract to be executed for this RFP, subject to the provisions of Chapter 119.07 of the Florida Statutes.

Any language contained in the Proposer's response to the RFP purporting to require confidentiality of any portion of the Proposer's response to the RFP, except to the extent that certain information is in the City's opinion a Trade Secret pursuant to Florida law, shall be void. If a Proposer submits any documents or other information to the City which the Proposer claims is Trade Secret information and exempt from Florida Statutes Chapter 119.07 ("Public Records Laws"), the Proposer shall clearly designate that it is a Trade Secret and that it is asserting that the document or information is exempt. The Proposer must specifically identify the exemption being claimed under Florida Statutes 119.07. The City shall be the final arbiter of whether any information contained in the Proposer's response to the RFP constitutes a Trade Secret. The city's determination of whether an exemption applies shall be final, and the proposer agrees to defend, indemnify, and hold harmless the city and the city's officers, employees, and agent, against any loss or damages incurred by any person or entity as a result of the city's treatment of records as public records. Proposals purporting to be subject to copyright protection in full or in part will be rejected.

EXCEPT FOR CLEARLY MARKED PORTIONS THAT ARE BONA FIDE TRADE SECRETS PURSUANT TO FLORIDA LAW, DO NOT MARK YOUR RESPONSE TO THE RFP AS PROPRIETARY OR CONFIDENTIAL. DO NOT MARK YOUR RESPONSE TO THE RFP OR ANY PART THEREOF AS COPYRIGHTED.

- 3.16 PROHIBITION OF INTEREST:** No contract will be awarded to a bidding firm who has City elected officials, officers or

employees affiliated with it, unless the bidding firm has fully complied with current Florida State Statutes and City Ordinances relating to this issue. Bidders must disclose any such affiliation. Failure to disclose any such affiliation will result in disqualification of the Bidder and removal of the Bidder from the City's bidder lists and prohibition from engaging in any business with the City.

- 3.17 RESERVATIONS FOR AWARD AND REJECTION OF BIDS:** The City reserves the right to accept or reject any or all bids, part of bids, and to waive minor irregularities or variations to specifications contained in bids, and minor irregularities in the bidding process. The City also reserves the right to award the contract on a split order basis, lump sum basis, individual item basis, or such combination as shall best serve the interest of the City. The City reserves the right to make an award to the responsive and responsible bidder whose product or service meets the terms, conditions, and specifications of the ITB and whose bid is considered to best serve the City's interest. In determining the responsiveness of the offer and the responsibility of the Bidder, the following shall be considered when applicable: the ability, capacity and skill of the Bidder to perform as required; whether the Bidder can perform promptly, or within the time specified, without delay or interference; the character, integrity, reputation, judgment, experience and efficiency of the Bidder; the quality of past performance by the Bidder; the previous and existing compliance by the Bidder with related laws and ordinances; the sufficiency of the Bidder's financial resources; the availability, quality and adaptability of the Bidder's supplies or services to the required use; the ability of the Bidder to provide future maintenance, service or parts; the number and scope of conditions attached to the bid.

If the ITB provides for a contract trial period, the City reserves the right, in the event the selected bidder does not perform satisfactorily, to award a trial period to the next ranked bidder or to award a contract to the next ranked bidder, if that bidder has successfully provided services to the City in the past. This procedure to continue until a bidder is selected or the contract is re-bid, at the sole option of the City.

- 3.18 LEGAL REQUIREMENTS:** Applicable provisions of all federal, state, county laws, and local ordinances, rules and regulations, shall govern development, submittal and evaluation of all bids received in response hereto and shall govern any and all claims and disputes which may arise between person(s) submitting a bid response hereto and the City by and through its officers, employees and authorized representatives, or any other person, natural or otherwise; and lack of knowledge by any bidder shall not constitute a cognizable defense against the legal effect thereof.

- 3.19 BID PROTEST PROCEDURE: ANY PROPOSER OR BIDDER WHO IS NOT RECOMMENDED FOR AWARD OF A CONTRACT AND WHO ALLEGES A FAILURE BY THE CITY TO FOLLOW THE CITY'S PROCUREMENT ORDINANCE OR ANY APPLICABLE LAW MAY PROTEST TO THE DIRECTOR OF PROCUREMENT SERVICES DIVISION (DIRECTOR), BY DELIVERING A LETTER OF PROTEST TO THE DIRECTOR WITHIN FIVE (5) DAYS AFTER A NOTICE OF INTENT TO AWARD IS POSTED ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:**
http://www.fortlauderdale.gov/purchasing/notices_of_intent.htm

THE COMPLETE PROTEST ORDINANCE MAY BE FOUND ON THE CITY'S WEB SITE AT THE FOLLOWING LINK:
<http://www.fortlauderdale.gov/purchasing/protestordinance.pdf>

PART IV BONDS AND INSURANCE

- 4.01 PERFORMANCE BOND:** If a performance bond is required in Special Conditions, the Contractor shall within fifteen (15) working days after notification of award, furnish to the City a Performance Bond, payable to the City of Fort Lauderdale, Florida, in the face amount specified in Special Conditions as surety for faithful performance under the terms and conditions of the contract. If the bond is on an annual coverage basis, renewal for each succeeding year shall be submitted to the City thirty (30) days prior to the termination date of the existing Performance Bond. The Performance Bond must be executed by a surety company of recognized standing, authorized to do business in the State of Florida and having a resident agent.

Acknowledgement and agreement is given by both parties that the amount herein set for the Performance Bond is not intended to be nor shall be deemed to be in the nature of liquidated damages nor is it intended to limit the liability of the Contractor to the City in the event of a material breach of this Agreement by the Contractor.

- 4.02 INSURANCE:** If the Contractor is required to go on to City property to perform work or services as a result of ITB award, the Contractor shall assume full responsibility and expense to obtain all necessary insurance as required by City or specified in Special Conditions.

The Contractor shall provide to the Procurement Services Division original certificates of coverage and receive notification of approval of those certificates by the City's Risk Manager prior to engaging in any activities under this contract. The Contractor's insurance is subject to the approval of the City's Risk Manager. The certificates must list the City as an ADDITIONAL INSURED for General Liability Insurance, and shall have no less than thirty (30) days written notice of cancellation or material change. Further modification of the insurance requirements may be made at the sole discretion of the City's Risk Manager if circumstances change or adequate protection of the City is not presented. Bidder, by submitting the bid, agrees to abide by such modifications.

PART V PURCHASE ORDER AND CONTRACT TERMS:

- 5.01 COMPLIANCE TO SPECIFICATIONS, LATE DELIVERIES/PENALTIES:** Items offered may be tested for compliance to bid

specifications. Items delivered which do not conform to bid specifications may be rejected and returned at Contractor's expense. Any violation resulting in contract termination for cause or delivery of items not conforming to specifications, or late delivery may also result in:

- Bidders name being removed from the City's bidder's mailing list for a specified period and Bidder will not be recommended for any award during that period.
- All City Departments being advised to refrain from doing business with the Bidder.
- All other remedies in law or equity.

- 5.02 ACCEPTANCE, CONDITION, AND PACKAGING:** The material delivered in response to ITB award shall remain the property of the Seller until a physical inspection is made and the material accepted to the satisfaction of the City. The material must comply fully with the terms of the ITB, be of the required quality, new, and the latest model. All containers shall be suitable for storage and shipment by common carrier, and all prices shall include standard commercial packaging. The City will not accept substitutes of any kind. Any substitutes or material not meeting specifications will be returned at the Bidder's expense. Payment will be made only after City receipt and acceptance of materials or services.
- 5.03 SAFETY STANDARDS:** All manufactured items and fabricated assemblies shall comply with applicable requirements of the Occupation Safety and Health Act of 1970 as amended, and be in compliance with Chapter 442, Florida Statutes. Any toxic substance listed in Section 38F-41.03 of the Florida Administrative Code delivered as a result of this order must be accompanied by a completed Safety Data Sheet (SDS).
- 5.04 ASBESTOS STATEMENT:** All material supplied must be 100% asbestos free. Bidder, by virtue of bidding, certifies that if awarded any portion of the ITB the bidder will supply only material or equipment that is 100% asbestos free.
- 5.05 OTHER GOVERNMENTAL ENTITIES:** If the Bidder is awarded a contract as a result of this ITB, the bidder may, if the bidder has sufficient capacity or quantities available, provide to other governmental agencies, so requesting, the products or services awarded in accordance with the terms and conditions of the ITB and resulting contract. Prices shall be F.O.B. delivered to the requesting agency.
- 5.06 VERBAL INSTRUCTIONS PROCEDURE:** No negotiations, decisions, or actions shall be initiated or executed by the Contractor as a result of any discussions with any City employee. Only those communications which are in writing from an authorized City representative may be considered. Only written communications from Contractors, which are assigned by a person designated as authorized to bind the Contractor, will be recognized by the City as duly authorized expressions on behalf of Contractors.
- 5.07 INDEPENDENT CONTRACTOR:** The Contractor is an independent contractor under this Agreement. Personal services provided by the Proposer shall be by employees of the Contractor and subject to supervision by the Contractor, and not as officers, employees, or agents of the City. Personnel policies, tax responsibilities, social security, health insurance, employee benefits, procurement policies unless otherwise stated in this ITB, and other similar administrative procedures applicable to services rendered under this contract shall be those of the Contractor.
- 5.08 INDEMNITY/HOLD HARMLESS AGREEMENT:** The Contractor agrees to protect, defend, indemnify, and hold harmless the City of Fort Lauderdale and its officers, employees and agents from and against any and all losses, penalties, damages, settlements, claims, costs, charges for other expenses, or liabilities of every and any kind including attorney's fees, in connection with or arising directly or indirectly out of the work agreed to or performed by Contractor under the terms of any agreement that may arise due to the bidding process. Without limiting the foregoing, any and all such claims, suits, or other actions relating to personal injury, death, damage to property, defects in materials or workmanship, actual or alleged violations of any applicable Statute, ordinance, administrative order, rule or regulation, or decree of any court shall be included in the indemnity hereunder.
- 5.09 TERMINATION FOR CAUSE:** If, through any cause, the Contractor shall fail to fulfill in a timely and proper manner its obligations under this Agreement, or if the Contractor shall violate any of the provisions of this Agreement, the City may upon written notice to the Contractor terminate the right of the Contractor to proceed under this Agreement, or with such part or parts of the Agreement as to which there has been default, and may hold the Contractor liable for any damages caused to the City by reason of such default and termination. In the event of such termination, any completed services performed by the Contractor under this Agreement shall, at the option of the City, become the City's property and the Contractor shall be entitled to receive equitable compensation for any work completed to the satisfaction of the City. The Contractor, however, shall not be relieved of liability to the City for damages sustained by the City by reason of any breach of the Agreement by the Contractor, and the City may withhold any payments to the Contractor for the purpose of setoff until such time as the amount of damages due to the City from the Contractor can be determined.
- 5.10 TERMINATION FOR CONVENIENCE:** The City reserves the right, in its best interest as determined by the City, to cancel contract by giving written notice to the Contractor thirty (30) days prior to the effective date of such cancellation.
- 5.11 CANCELLATION FOR UNAPPROPRIATED FUNDS:** The obligation of the City for payment to a Contractor is limited to the availability of funds appropriated in a current fiscal period, and continuation of the contract into a subsequent fiscal period is subject to appropriation of funds, unless otherwise authorized by law.
- 5.12 RECORDS/AUDIT:** The Contractor shall maintain during the term of the contract all books of account, reports and records in

accordance with generally accepted accounting practices and standards for records directly related to this contract. The Contractor agrees to make available to the City Auditor or designee, during normal business hours and in Broward, Miami-Dade or Palm Beach Counties, all books of account, reports and records relating to this contract should be retained for the duration of the contract and for three years after the final payment under this Agreement, or until all pending audits, investigations or litigation matters relating to the contract are closed, whichever is later.

- 5.13 PERMITS, TAXES, LICENSES:** The successful Contractor shall, at their own expense, obtain all necessary permits, pay all licenses, fees and taxes, required to comply with all local ordinances, state and federal laws, rules and regulations applicable to business to be carried out under this contract.
- 5.14 LAWS/ORDINANCES:** The Contractor shall observe and comply with all Federal, state, local and municipal laws, ordinances rules and regulations that would apply to this contract.
- 5.15 NON-DISCRIMINATION:** There shall be no discrimination as to race, sex, color, creed, age or national origin in the operations conducted under this contract.
- 5.16 UNUSUAL CIRCUMSTANCES:** If during a contract term where costs to the City are to remain firm or adjustments are restricted by a percentage or CPI cap, unusual circumstances that could not have been foreseen by either party of the contract occur, and those circumstances significantly affect the Contractor's cost in providing the required prior items or services, then the Contractor may request adjustments to the costs to the City to reflect the changed circumstances. The circumstances must be beyond the control of the Contractor, and the requested adjustments must be fully documented. The City may, after examination, refuse to accept the adjusted costs if they are not properly documented, increases are considered to be excessive, or decreases are considered to be insufficient. In the event the City does not wish to accept the adjusted costs and the matter cannot be resolved to the satisfaction of the City, the City will reserve the following options:
1. The contract can be canceled by the City upon giving thirty (30) days written notice to the Contractor with no penalty to the City or Contractor. The Contractor shall fill all City requirements submitted to the Contractor until the termination date contained in the notice.
 2. The City requires the Contractor to continue to provide the items and services at the firm fixed (non-adjusted) cost until the termination of the contract term then in effect.
 3. If the City, in its interest and in its sole opinion, determines that the Contractor in a capricious manner attempted to use this section of the contract to relieve them of a legitimate obligation under the contract, and no unusual circumstances had occurred, the City reserves the right to take any and all action under law or equity. Such action shall include, but not be limited to, declaring the Contractor in default and disqualifying him for receiving any business from the City for a stated period of time.
- If the City does agree to adjusted costs, these adjusted costs shall not be invoiced to the City until the Contractor receives notice in writing signed by a person authorized to bind the City in such matters.
- 5.17 ELIGIBILITY:** If applicable, the Contractor must first register with the Department of State of the State of Florida, in accordance with Florida State Statutes, prior to entering into a contract with the City.
- 5.18 PATENTS AND ROYALTIES:** The Contractor, without exception, shall indemnify and save harmless the City and its employees from liability of any nature and kind, including cost and expenses for or on account of any copyrighted, patented or un-patented invention, process, or article manufactured or used in the performance of the contract, including its use by the City. If the Contractor uses any design, device, or materials covered by letters, patent or copyright, it is mutually agreed and understood without exception that the bid prices shall include all royalties or costs arising from the use of such design, device, or materials in any way involved in the work.
- 5.19 ASSIGNMENT:** Contractor shall not transfer or assign the performance required by this ITB without the prior written consent of the City. Any award issued pursuant to this ITB, and the monies, which may become due hereunder, are not assignable except with the prior written approval of the City Commission or the City Manager or City Manager's designee, depending on original award approval.
- 5.20 LITIGATION VENUE:** The parties waive the privilege of venue and agree that all litigation between them in the state courts shall take place in Broward County, Florida and that all litigation between them in the federal courts shall take place in the Southern District in and for the State of Florida.
- 5.21 LOCATION OF UNDERGROUND FACILITIES:** If the Contractor, for the purpose of responding to this solicitation, requests the location of underground facilities through the Sunshine State One-Call of Florida, Inc. notification system or through any person or entity providing a facility locating service, and underground facilities are marked with paint, stakes or other markings within the City pursuant to such a request, then the Contractor, shall be deemed non-responsive to this solicitation in accordance with Section 2-184(5) of the City of Fort Lauderdale Code of Ordinances.

5.22 PUBLIC RECORDS

IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT. CONTACT THE CUSTODIAN OF PUBLIC RECORDS AT: (954-828-5002, PRRCONTRACT@FORTLAUDERDALE.GOV, CITY CLERK'S OFFICE, 100 NORTH ANDREWS AVENUE, FORT LAUDERDALE, FLORIDA 33301)

- Contractor shall:

1. Keep and maintain public records that ordinarily and necessarily would be required by the City in order to perform the service.
2. Upon request from the City's custodian of public records, provide the City with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Chapter 119, Florida Statutes (2016), as may be amended or revised, or as otherwise provided by law.
3. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this contract if the Contractor does not transfer the records to the City.
4. Upon completion of the Contract, transfer, at no cost, to the City all public records in possession of the Contractor or keep and maintain public records required by the City to perform the service. If the Contractor transfers all public records to the City upon completion of this Contract, the Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If the Contractor keeps and maintains public records upon completion of this Contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.

Question and Answers for Bid #475-11780 - Enterprise Asset Management System

Overall Bid Questions

There are no questions associated with this bid.

Question Deadline: May 11, 2017 5:00:00 PM EDT